



**USAID**  
FROM THE AMERICAN PEOPLE



# PUBLISHING COLLABORATIVES

## Research Report

By Richard A. B. Crabbe

# CONTENTS

<b>EXECUTIVE SUMMARY</b>	<b>I</b>
<b>INTRODUCTION</b>	<b>3</b>
THE NEED	3
READING MATTERS	4
THE GLOBAL BOOK ALLIANCE: CATALYST FOR SOLUTION	4
PUBLISHING COLLABORATIVES	5
<b>METHODOLOGY</b>	<b>6</b>
<b>KEY FINDINGS</b>	<b>8</b>
WHAT DOES THE RESEARCH SAY?	9
INCENTIVES TO ENCOURAGE PUBLISHER PARTICIPATION	13
MINORITY LANGUAGES	14
WHAT WORKED IN THE PAST, AND WHAT HAS NOT?	15
THE AFRICAN PUBLISHING COLLABORATIVE: A FRESH START	16
PITFALLS TO AVOID	16
BEST PRACTICES FROM “THE FIELD”	17
POTENTIAL PARTNERSHIPS	17
<b>CONCLUSION</b>	<b>20</b>
<b>RECOMMENDATIONS</b>	<b>21</b>
<b>ANNEXES</b>	<b>24</b>
ANNEX 1: INTERVIEW QUESTIONS FOR STAKEHOLDERS	24
ANNEX 2: QUESTIONS FOR COUNTRY PROFILE OF PUBLISHING INDUSTRY	25
ANNEX 2.1: ENGLISH VERSION	25
ANNEX 2.2: FRENCH VERSION	27
ANNEX 3: SUMMARY OF ISSUES FROM INDUSTRY PROFILES	29
ANNEX 4: SUBMITTED COUNTRY PROFILES	31
<b>PROFIL DE L’INDUSTRIE DU LIVRE</b>	<b>35</b>
ANNEX 5: CONSIDERATIONS TO GUIDE LAUNCH OF A PUBLISHING COLLABORATIVE	62
ANNEX 6: CONCEPT NOTE FOR A MINI-INITIATIVE TO TEST BEST PRACTICE	63
ANNEX 7: READING CODE	67
ANNEX 8: SAVE THE CHILDREN’S WHOLE CHAIN APPROACH	69
ANNEX 10: CONFERENCES, MEETINGS, AND SEMINARS ON PUBLISHING AND BOOK DEVELOPMENT IN AFRICA, 1968 TO 2018	72
ANNEX 11: LIST OF INTERVIEWEES	74
<b>ENDNOTES</b>	<b>75</b>

## EXECUTIVE SUMMARY

The book publishing industry in Africa is not a single monolith; it is growing, attracting young talent, willing to experiment, and producing more than just textbooks. The opportunities and challenges these businesses face reflect the larger dynamics of their countries and regions. Content and production quality have improved dramatically over the last 10 years. There is growth in digital content, particularly fiction in Nigeria, by a young cadre of publishers. There is increasing interest in the production of books in local languages, partly to support changes in school curriculum, as this gains ground. And there is growing interest in cross-border publishing. East Africa shows strong regional market operations by publishers—especially from Kenya and Uganda—in neighboring countries such as Rwanda, South Sudan and Zambia. Meetings have been held and there is ongoing communication among industry players to revive the African Publishers Network to facilitate the exchange of ideas and information, and to assist in capacity building. Africa’s demographics—in 2015 children aged 0-14 years numbered 474 million,<sup>1</sup> about 41 percent of the population—coupled with ongoing improvements in literacy and education, should point to a bright future for the industry.

But challenges remain, some of which have persisted for decades, despite assistance programs and various attempts at getting industry players to work together. Increasing difficulty to access and benefit from the school textbook market as some countries have moved to one book per subject selected for purchase by Government (Kenya, Tanzania) or are considering doing so (South Africa). This has the potential to squeeze out several publishers, tighten investment in supplementary readers, compromise quality and delivery, and increase price in the longer term. Government purchases of books for libraries are very little to zero. Most libraries are dependent on ad hoc donor funding or huge shipments of donated books from overseas through NGOs or development partners.

Publishers struggle with long-term business planning because of unclear (or the absence of) national policies under which to operate. Of particular concern are the policies regarding development, procurement and supply, as well as taxation of inputs and incentives, as recently happened in Kenya.<sup>2</sup> It is difficult to discuss the industry’s sustainability when publishers are trying hard to just stay afloat. Weak distribution networks seem prevalent in and across most countries. Bookselling has suffered from procurement practices that eliminate them completely, favoring delivery by publishers to the point of use or collection points designated by Government or donor agencies that purchase books. Weakening independent bookselling leads to the unintended consequence of limited access to books, which in turn promotes piracy.

Developments in mobile technology, including local payment options and the huge number of people that now have phones, offer some of the best options to reach other markets in Africa and globally that print currently does not serve. Publishers in Ghana, Kenya, and Nigeria have found that digital offers the benefit of reduced production costs and shorter timelines to market with the added benefit of not needing a minimum print run for new publishers joining the market.<sup>3</sup> E-book publishing is still in the early stages, but many of the publishers that Worldreader works with in Sub-Saharan Africa are producing their own files, converting more than 50 percent of their book list, and setting up distribution platforms or participating in regional or international platforms with success.

In addition to the challenges, reliable statistics on the book publishing industry are hard to obtain. Record-keeping at industry- and government-level is weak, a characteristic that hampers advocacy and strategic planning.

Over the past 40+ years, many pan-African or regional organizations, programs, networks, and other initiatives in the book sector have failed, despite their best intentions.<sup>4</sup> So, what can be done to breathe new life into the African book publishing industry and make it sustainable?

In January 2018, participants at the Regional Workshop for African Book Industry Stakeholders in Abidjan unanimously adopted the concept of an African Publishing Collaborative—an action plan around five pillars for advocating and establishing innovative and effective mechanisms within countries for the production, acquisition, distribution, management and use of textbooks and other reading materials in national languages. The 5 Pillars of intervention are: (i) Advocacy, policy dialogue and reading promotion; (ii) Training and research; (iii) Local languages; (iv) Publishing partnerships; and (v) Bookselling and distribution.

The Global Book Fund Feasibility Study (2016) stated that “a new global entity is needed to break away from the traditional donor-project approach and instead play a system-strengthening role,<sup>5</sup> and “local publishing is important to ensure that book content is culturally relevant.”<sup>6</sup>

The Global Book Alliance, which evolved from discussions begun from 2012,<sup>7</sup> aims “to guarantee that children everywhere have the books and learning materials they need to learn to read and read to learn.” In its 2018-2020 strategy, the Alliance states that it recognizes that the long-term solution to the global children’s book gap is in establishing robust local markets for books. To help those markets develop, the Alliance will address challenges across the entire book chain, from title development, publication, procurement, distribution, and use. The Alliance will identify innovative ideas, test them, and replicate successful approaches within and across countries.<sup>8</sup>

Among four flagship initiatives that the Alliance will deploy to achieve the strategy is publishing collaboratives (PC). The multiple issues mean that no single intervention can address all the elements of a functioning market. No one-size-fits-all approach will work. What is needed in Ghana, for example, might be very different from what is needed in Uganda. A holistic and country-centric approach is therefore required to address barriers across the book chain, and support a self-sustaining market that encourages a reading culture to flourish and offers commercial opportunities for publishers beyond governments and aid organizations to sell their books. An effective supply of books requires high-quality title development, access to those titles by printers and publishers and a functioning supply chain to deliver books to their potential readers.<sup>9</sup> PCs are envisaged as a facilitator and coordinator for the creation, production and supply of a range of publishing projects, of high quality children’s books and lower grade readers in local languages. By virtue of their role in dealing with almost all actors in the book supply chain, publishers are central to the concept of publishing collaboratives.

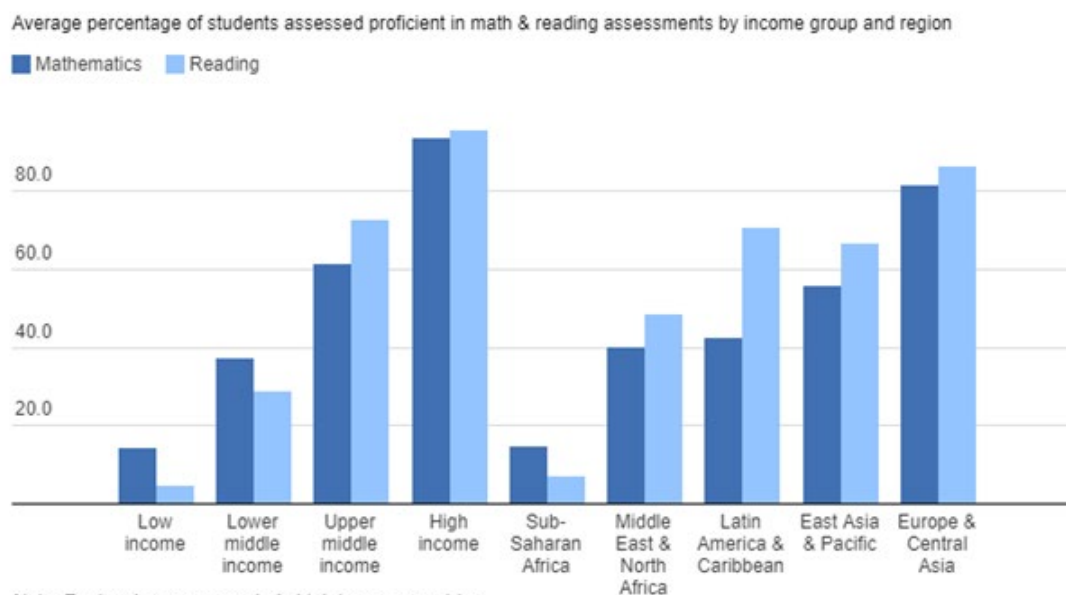
This report highlights findings from a study of 11 African countries: Ghana, Guinea, Kenya, Malawi, Mali, Nigeria, Rwanda, Tanzania, Togo, Uganda, and Zambia. The recommendations provide ideas that can be developed in-country as well as internationally, and affirm that positive changes and growth can result from concerted and sustained efforts involving the book publishing industry, governments, development partners, and nongovernmental organizations.

## INTRODUCTION

Globally, more than 617 million, or six out of ten children and adolescents worldwide, are not achieving minimum proficiency levels (MPLs) in reading and mathematics, according to new estimates from the UNESCO Institute for Statistics (UIS). This number is the equivalent of three times the population of Brazil.<sup>10</sup> It includes more than 387 million children of primary school age (about 6 to 11 years old) and 230 million adolescents of lower secondary school age (about 12 to 14 years old). This means that more than one-half – 56 percent – of all children won’t be able to read or handle mathematics with proficiency by the time they are of age to complete primary education. The proportion is even higher for adolescents, with 61 percent unable to achieve minimum proficiency levels when they should be completing lower secondary school.<sup>11</sup>

The World Bank Group’s World Development Report 2018 asserts that “in the poorest countries, fewer than 1 in 5 primary school kids are proficient in math & reading”<sup>12</sup> (see Figure 1).

**FIGURE 1: THE PERCENTAGE OF PRIMARY SCHOOL STUDENTS WHO PASS A MINIMUM PROFICIENCY THRESHOLD IS OFTEN LOW**



Source: World Development Report 2018 using "A Global Data Set on Education Quality" by Allinok, Angrist, and Patrinos 2017

## THE NEED

In Sub-Saharan Africa, more than 85 percent of children are not learning the minimum proficiency levels for Reading and Mathematics. Despite years of steady growth in enrolment rates, the education situation in Sub-Saharan Africa continues to threaten the future of entire generations. New UIS data show that 88 percent of all children and adolescents will not be able to read proficiently by the time they are of age to complete primary and lower secondary education. If current trends continue, this crisis will affect about 202 million children and adolescents, including 138 million of primary school age and 63 million of lower secondary school age.<sup>13</sup>

There are undoubtedly numerous challenges to reversing the global learning crisis. A critical but neglected one is the lack of quality reading materials in a language that children use and understand. For example, in Malawi, there are approximately 2.2 million native speakers of Tumbuka and another 2.2 million speakers of Yao. Yet, there are fewer than 20 reading book titles available in either language, leaving nearly 25 percent of Malawi's population without the materials necessary to acquire and sustain basic literacy.<sup>14</sup>

Access to age-appropriate and culturally relevant books is a huge barrier in developing countries. Most books currently available tend to be for children who can already read or written in a language children do not yet understand or parents cannot read. In addition, books are more accessible to families living in urban areas or who can afford them. Children in rich households are more likely to have access to books than children in poor households. In 76 developing countries with available data, only 15 percent of children under age 5 have three or more children's books at home.<sup>15</sup> When books are available, parents in poor households are the least likely to use them with their children. Addressing the book shortage therefore needs to happen in tandem with efforts to increase utilization of these books by families in an age appropriate and enjoyable manner.<sup>16</sup> Success in school and life is not measured by how many words a child can read and understand, but rather, what a child can do with those words. Supporting children's reading development within a broader learning agenda that develops children's cognitive and non-cognitive skills will position children for lifelong success.<sup>17</sup>

The Education for All era taught us that access does not equate to learning. Quality matters too. Higher quality of the teaching and learning environment positively correlates with children's development, including emergent literacy abilities such as book knowledge, receptive and expressive language, and print awareness.<sup>18</sup> *Africa Language and Literacy: A Landscape Review of Language and Literacy Research in African Contexts*, a report published by CODE states, "Print literacy materials, such as textbooks and storybooks, are key to helping students develop high levels of literacy. Yet there are often few textbooks and storybooks in African schools, particularly in African languages. Increasing the number of books available to students is important, but teachers' use of textbooks and storybooks in the classroom is also key, as making books available does not necessarily mean they will be utilized effectively. The publishing industry faces challenges from low demand and import of books from abroad."<sup>19</sup>

## **READING MATTERS**

Being read to from a young age is perhaps the strongest predictor of later reading outcomes.<sup>20</sup> Books introduce children to the world of print, new vocabulary and how books work, and they also invite children to hear and use language in various ways. But, if there are no books, how does a parent or teacher read to a child? There is a dearth of age-appropriate and contextually appropriate books in developing countries, especially in languages children use and understand (e.g., picture books, big books, alphabet books, word books, books with short sentences). Increasing the quantity and variety of children's books is essential. Book development initiatives at multiple levels (national, regional, provincial, local) involving local authors, illustrators, printing houses, teachers, parents, librarians, community members and even children can help address this gap. The greater the number of age appropriate and contextually relevant books and the more opportunities that are made available to interact with these books, the stronger children's foundation for reading in the early grades. However, simply focusing on the provision of books will not solve the problem. Simultaneous efforts to encourage utilization of these books at home and school and other programs will be equally important.<sup>21</sup>

## **THE GLOBAL BOOK ALLIANCE: CATALYST FOR SOLUTION**



Two of the key points identified in the Global Book Fund (GBF) Feasibility Study were that “a new global entity is needed to break away from the traditional donor-project approach and instead play a system-strengthening role,<sup>22</sup> and “local publishing is important to ensure that book content is culturally relevant.<sup>23</sup> The Global Book Alliance, a partnership of donor agencies, multilateral institutions, and civil society organizations that are committed to bringing books to every child in the world by 2030, is positioning itself to respond to these two key points.

The Alliance states, “We are engaged in an inclusive planning process to meet this challenge. By building sustainable markets for the provision of reading materials produced in languages children use and understand (including braille and sign languages), the Alliance strives to open the door to lifelong learning for millions of children who don’t currently have books from which they can learn with ease.”<sup>24</sup> In line with this, the Alliance’s 2018-2020 Strategy envisages “a world in which all children are achieving literacy and have access to quality books that they can use to learn to read, read to learn and develop a love of reading.”<sup>25</sup>

An effective supply of books requires high quality title development, access to those titles by printers and publishers and a functioning supply chain to deliver books to their potential readers.<sup>26</sup> The Alliance will support work across the entire book chain, building supply and demand for books simultaneously and reinforcing each link in the supply chain until it is strong enough to support itself. The Alliance further states that it will improve book development by fostering the creation of new book titles for early learners in neglected languages, and will provide access in many formats, licensed for translation, and readable by children of all abilities. It will also work to improve supply chains to reduce loss and wastage and coordinate procurement to increase efficiency and target books to those who need them most. It will also ensure that teachers, families, and community members have the tools they need to use books effectively to support literacy development, wider learning and ultimately a love of reading.<sup>27</sup>

## **PUBLISHING COLLABORATIVES**

To achieve scale quickly, the Alliance will support publishers in low-resource settings to identify and create high-quality titles, building local publishing markets.

*“Publishing Collaboratives will support local publishers as the cornerstone for local book development, creating the culturally appropriate titles that will populate classrooms.”<sup>28</sup>*

The Alliance’s 2018-2020 strategy states that publishing collaboratives “will seed the collection of storybooks in neglected languages and improve book development by working with the publishing industry to improve both the quantity and quality of supplementary reading materials. Regional and national publishing collaboratives will support local publishers as the cornerstone of local book development, creating the culturally appropriate titles that will one day populate classrooms. The collaboratives may support writers’ forums and book fairs, websites to match talent with publishers, and/or training on quality standards and technology to support book development and adaptation across contexts and languages.”<sup>29</sup>

## METHODOLOGY

This research was carried out under the general direction of a Technical Advisory Group (TAG) comprised of internationally recognized experts in the book publishing industry. Membership of the TAG was kept small to facilitate ease of meeting and to maximize input from members.

The following questions guided the work:

1. Are the challenges that publishers face today different from the ones they confronted thirty years ago? What were they then and what are they now?
2. Are there national interventions that can promote a sustainable publishing industry, such as national book policies and preferential customs and VAT policies?
3. What should be the scope of the PC's activities?
4. What would publishers expect from a PC to justify their participation? By the same token, what would constitute publisher 'buy-in'?
5. Should the PC(s) be national, sub-regional, regional or global?
6. Who should comprise the PC membership? Is there interest in a PC that includes both commercial and NGO publishers? How should governments and funders participate in a PC, if at all?
7. Should the PC be a part of an existing organization? Who would lead it? What are suitable governance and funding structures?

Given the short duration of the research assignment (6 months), and the vast constituency from which to obtain and analyze information (African countries), the following methods were used to collect information:

### **Literature review: publications, conference/seminar documents**

A plethora of materials exists on the growth and development of the book industry in Africa, chief among which is the *African Book Publishing Record*, a review started by Hans Zell in the 1970s. Zell's recent publications, *Publishing & the Book in Africa: A Literature Review for 2017* and *Publishing, Books, and Reading in Sub-Saharan Africa: A Critical Bibliography* were very insightful. Documents produced following three major book publishing industry events held in Yaoundé, Cameroon; Abidjan, La Côte d'Ivoire, and Lagos, Nigeria proved timely and helpful in mapping the way forward.

### **Internet research: relevant websites**

Website sources included African Storybook (South Africa), Osu Children's Library Fund (Ghana), Puku Children's Literature Foundation (South Africa), StoryWeaver (India), Worldreader (USA), and Yambeka Children Media (Namibia). These websites are generally dedicated to producing, promoting, and making available and more accessible books for children in their languages. They showcase reading material and explain how they work with writers and publishers to generate content.



## **Interviews with key stakeholders**

Questionnaires were developed and used to gather information from (i) TAG members; (ii) key stakeholders in the African publishing industry; and (iii) national publishers associations. Interviews were conducted face-to-face, by telephone or over Skype. Questionnaires were submitted by email. They can be found in Annex 2.

Those interviewed included experienced publishers as well as new entrants into publishing in Africa; longtime researchers of the African publishing scene; government officials; selected individuals working with multilateral institutions such as the World Bank and USAID; staff of international nongovernmental organizations such as CODE, Room to Read, and Save the Children; the focal points for Anglophone and Francophone Africa for the Working Group on Books and Learning Materials, Association for the Development of Education in Africa (ADEA-WGBLM). See Annex 10 for list of those interviewed and their affiliations.

## **Country profiles**

Representatives from 13 African countries—Ethiopia, Ghana, Guinea, Kenya, Malawi, Mali, Nigeria, Rwanda, Senegal, Tanzania, Togo, Uganda, and Zambia—were invited to submit brief profiles on the state of the publishing industry in their respective countries. Representatives were generally officers of a publishers association; a few were recommended during interviews. Submissions—one per country—were received from Ghana, Guinea, Kenya, Malawi, Mali, Nigeria, Rwanda, Tanzania, Togo, and Uganda. Zambia had two submissions, so the information was aggregated. The information here was considered in addition to findings reported in the Global Book Fund Feasibility Study. The profiles, as submitted, can be found in Annex 4.

## **Limitations**

In order to fully capture the reality on the ground, it is important for at least part of such research to include field visits. However, this was not provided for, and this research has had to rely on written submissions from contacts in selected countries. Compared to being on-site, emails, Skype, and telephone conversations do not fully and completely tell the story. Face-to-face interactions can provide more in-depth information than a short written answer to a question. Also, being on-site enables one to verify written submissions and understand better the prevailing working environment or the economic conditions in which publishers operate. The difficulty in obtaining data on books published annually was evident in almost all profiles submitted. The absence of a budget for translation of interview documents into French delayed efforts to obtain responses from Francophone stakeholders. If GBA aims to cover all of Africa, the issue of language has to be catered for to facilitate communication.

## KEY FINDINGS

Below is the summary of key findings.

### TOP 5 MAJOR ISSUES FACING THE BOOK PUBLISHING INDUSTRY<sup>30</sup>

1. *National book policy*: This is generally non-existent across the countries surveyed. Where a textbook policy exists, it is often sidestepped in decision making.
  2. *Distribution*: This includes marketing and bookselling. Weak infrastructure (road transport, digital) hampers in-country and cross-border delivery and trade. Excluding distributors/booksellers in tenders is killing the trade.
  3. *Staffing*: Inadequate professionally skilled personnel leads to low production quality of books.
  4. *Taxes*: Customs duties and value-added tax (VAT) on locally produced or imported books contribute to high cost of books.
  5. *Piracy*: A combination of weak enforcement of laws protecting intellectual property and books not being available or easily accessible.
- 

### TOP 5 CAPACITY BUILDING NEEDS

1. *The publishing process*: cost-efficient, quality print and digital book development processes, e-publishing, and e-learning.
  2. *Editing*: editorial management, copyediting, editing to required reading level.
  3. *Marketing and distribution*: promotional activities, bookselling, partner opportunities, online distribution and sales.
  4. *Staff development*: staff and management training, professional skills training.
  5. *Policy dialogue*: negotiation skills and advocacy.
- 

### MAIN BARRIERS TO PRODUCING EARLY GRADE READING BOOKS

1. Lack of editorial competence.
  2. High production cost.
  3. No market; no government purchases (for schools or libraries).
  4. Few trained authors, illustrators, or designers to create books for these levels.
  5. Weak government support; no operating framework.
- 

### IMPEDIMENTS TO CROSS-BORDER BOOK DISTRIBUTION AND TRADE

1. Customs duties and taxes.
  2. Transportation problems: poor roads, high transportation cost.
  3. Language (orthography): The same language is sometimes written differently across the border.
-

## WHAT DOES THE RESEARCH SAY?

Findings from this research corroborate the ideas and action plan embodied in the African Publishing Collaborative. The main findings are discussed below under positives and negatives.

**Positives** identified include:

- **Overall, the book industry is growing, with a new cadre of younger talent coming on board.** Zell and Thierry have noted that “there can be no denying that publishers have made good progress in meeting local book needs. Nowadays there are a large number of innovative and highly enterprising publishers. The publishing output has by no means been restricted to textbook publishing as is constantly alleged. For instance, in addition to a wide range of creative writing, general interest books, and books on African arts and cultures, it has also included a very substantial number of African children’s books, and this particular area of publishing has made enormous strides in recent years, both in terms of publishing output, and the quality of the books and illustrations.”<sup>31</sup>
- **There is growing interest among publishers in production of books in local languages,** partly to support changes in school curriculum, as instruction in mother tongue gains ground.<sup>32</sup>
- **Cross-border publishing is a potential area for growth.** East Africa shows strong regional market operations by publishers—especially from Kenya and Uganda in neighboring countries such as Rwanda and South Sudan.
- **Content and production quality have improved over the last 10-20 years.** There is growth in digitally published fiction, particularly in Nigeria, by a young cadre of publishers.<sup>33</sup> When Worldreader studied the efficacy of e-readers in early grade reading programs in Ghana from 2012 to 2014, it found that the group of students that received e-readers greatly outperformed the baseline groups on basic reading comprehension and at the average minimum standard speeds of 45 and 60 correct words per minute (CWPM) believed to be required for comprehension and retention of texts.<sup>34</sup> For the study, each of the students, their teachers, and head teachers received an e-reader loaded with 240 titles, including some sourced from local publishers. It should be noted that given the low-income levels in rural areas across Sub-Saharan Africa, the economics of delivering e-books for children to the schools market could prove a challenge. With a level playing field, local (national) publishers are competing better today with multinationals during tenders, compared with 10, 15 or 20 years ago. Indigenous publishers in Ghana, Kenya, and Nigeria have successfully won tenders on competitive basis and delivered quality books to schools.
- **Publishers are revitalizing networking.** As discussed during the January 2018 Regional Workshop for African Book Industry Stakeholders in Abidjan, efforts are underway to revive the African Publishers Network (APNET) to facilitate the exchange of ideas and information, and to assist in capacity building. In the 1990s, APNET served as a strong voice for African publishing, advocating for policies and practices to strengthen the industry. This diminished as the organization weakened due to lack of funding for its operations. A vibrant WhatsApp platform now serves as the main means of information, and members use opportunities at book events to meet and strategize for action and to provide feedback to the Board.
- **Digital/electronic publishing is still in a nascent stage.** Many publishers have embraced the format, with 50 percent of their catalog available as epublications, and it does offer promise. Delivery on a large scale might be a challenge in the near term. Some interviewees mentioned pressure to use e-books in schools, even from government, as in Kenya and South Africa. But, apart from these two countries, the required infrastructure, including electricity and internet connectivity,

is currently not available. As such, e-books for children will likely not replace print versions in the near future.<sup>35</sup> It is more likely that both formats will coexist in the foreseeable future.

- **National publishers associations offer a vital launching pad for publishing collaboratives.** In almost all countries surveyed, the publishers' association is the most active professional body in the industry. Some associations (Mali and Rwanda) already group include publishers and booksellers. In both Anglophone and Francophone Africa, there are experienced professionals and national publishers' associations that GBA can work with in developing publishing collaboratives.

#### On the negative side:

- **Increasing difficulty in accessing and benefiting from the school textbook market.** For educational and school book publishers, a new threat is moves by some African governments to introduce and implement a policy of just one officially sanctioned textbook per subject and grade (Kenya, Rwanda, Tanzania) or are considering doing so (South Africa), thus ending the current situation of a multiplicity of books from a variety of publishing houses, competing in an open market. This has the potential to squeeze out several publishers, tighten investment in supplementary readers, compromise quality and delivery, and increase per unit prices in the longer term, as happened in the 1970s and 1980s. Consider that the report of the 1968 UNESCO held in Accra, Ghana, stated: "A controversy has of late arisen as to whether the preparation and publication of books for educational purposes should be in the hands of private enterprise or the government. If in private hands, the production would be motivated by private profits which may disregard educational objectives. If in government hands, then political influences such as favouritism and undue interference may override social considerations. But it may be expedient to conserve the government capital resources and private enterprise may be allowed to develop rapidly to its maximum capacity."<sup>36</sup>
- **Government purchases of books for libraries are very little to zero.** For example, Kenya's national library service (knls) has extensive outreach across the country through its public, community, and mobile library services, but no funding to buy new books. Most libraries in African countries are dependent on ad hoc donor funding from NGOs or development partners. For many African publishers expectations of local library sales are a thing of the past. As the bulk of library purchases tend to be supplementary readers, the combination of very low purchases of locally published materials, and influx of overseas book donation programs which ship tens of millions of free books to African public and other libraries every year negatively impacts the local book publishing industry. Zell and Thierry point out that "large-scale book donation schemes, and huge quantities of free books flooding their markets, have an adverse impact on the local publishing industries and the book trade, and that such donations can only be justified if they are recipient-request led, and are supportive of the local 'book chain' at the same time."<sup>37</sup> Well-equipped community libraries are critical to foster reading and reach beyond schools.
- **Publishers struggle with long-term business planning** because of unclear (or in the absence of) national policies under which to operate. Of particular concern are the policies regarding development, procurement and supply, as well as taxation of books and raw materials used for printing, as recently happened in Kenya.<sup>38</sup>
- **Publishing for the sight-impaired is largely non-existent.** Of the 11 countries that responded to questionnaires, none had mainstream publishers actively involved in publishing for the sight-impaired.

In countries, where some publishing takes place, it is undertaken by NGOs (Ghana) or the government (Kenya, Zambia). Weak distribution networks seem prevalent in and across most countries. Bookselling has suffered from procurement practices that sideline them completely, favoring delivery by publishers (often through commercial transporters) to the point of use or collection points designated by Government or donor agencies that purchase books. Weakening independent bookselling leads to the unintended consequence of limited access to books, which in turn promotes piracy.

- **Reading promotion and book use is inconsistent.** The book publishing sector is not generally actively and consistently involved in the promotion reading and book use, except for annual or occasional book exhibitions/fairs. A few NGOs are active in this area. Studies have found a positive relationship between children's attitudes towards reading and reading achievement. For example, in the 2011 results of the Progress in International Reading Literacy Study (PIRLS) in OECD countries, the more fourth grade students thought reading was important, the higher their reading scores. In addition, the more confident they were in their reading abilities, the higher their reading scores.<sup>39</sup> When children are first introduced to reading materials, it is essential that these experiences be fun, engaging and enjoyable. The more pleasurable their initial experiences with books, the more likely they will have a positive attitude towards reading in the future. The more positive their attitude towards books and reading, the more they will read. Children need a variety of "age- and context appropriate reading materials that spark their imagination and motivation to read, and build on their existing language skills."<sup>40</sup>

Children who look at books with their parents and are read to from an early age tend to know more words, have higher cognitive abilities, are more interested in books, and become better readers in the future.<sup>41</sup> The benefits extend to parents too. In contexts where parents are illiterate or low literate, the pleasure of looking at books with their children helps them see value in being able to read and motivates them to improve their own literacy skills. This positively benefits children, as the more literate the parents, the more confident and able they will be to read to their children. Moreover, when parents read at home for themselves or with their children, their children are more likely to pick up a book and want to read.

- **Credible statistics are hard to obtain.** Record-keeping at industry- and government-level is weak. Hans Zell has noted that "Book publishing data and book production statistics are important elements in measuring the growth and vitality of indigenous publishing in any part of the world, but reliable figures of book publishing output for the continent of Africa do not exist at the present time, with the exception of South Africa and, to a limited extent, for one or two other countries."<sup>42</sup> Speaking at an IPA Seminar in Lagos, Nigeria, José Borghino, Secretary General of the IPA, voiced the importance of data and urged African publishers to start collecting data about their industry. "Without accurate data, all our stories are just anecdotes," he said. Data can support publishers when they lobby governments for change.<sup>43</sup>
- **Some governments have taken over publishing for the educational market.** Publishers in countries like Rwanda and Tanzania face a bleak future following decisions by the respective ministries of education to take over the development and production of textbooks.<sup>44</sup>
- **There seems to be very little cooperation between publishers and public authorities**—the government, and ministries of education, for example. There is currently a strong measure of tension between private sector publishers and the government in several African countries, not only because of the absence of clear national book policies, but also because publishers see their activities and livelihoods threatened by government moves to control educational/school book

publishing.<sup>45</sup> <sup>46</sup> This results in lack of engagement, particularly over policy issues or decisions that affect the industry.

- **Corruption and conflict of interest are serious issues in book procurement.** Corruption is an issue throughout the procurement process, from planning to evaluation to award. The World Bank has defined corruption as the abuse of public office for private gain.<sup>47</sup> Public office is abused for private gain when an official accepts, solicits, or extorts a bribe or other kinds of gain, or uses threats, in exchange for preferential treatment. There are many kinds of corruption. It is also abused when private agents actively offer bribes and other kinds of gain, or use threats, to circumvent public policies and processes for competitive advantage and profit.<sup>48</sup> Conflict of interest occurs in many ways, but one of the primary forms of conflict of interest in textbooks is allowing government officials to participate in the book writing process and also in the book evaluation process. The procurement process, when not effectively managed, creates windows of opportunity for illicit payments. This practice affect the quality and value of the supplies procured and, ultimately, the services provided to students, since bribes bias the selection of the best and most cost-effective books. Procurement risk is also connected to dealing with public officials. These interactions often involve solicitation of bribes of small value made to encourage usually low-ranking government officials simply to do their jobs.<sup>49</sup>

The tender process, particularly for public procurement, is a recognized area of vulnerability and stories circulate about contracts “bought” with bribes during the tendering process, obtained through threat or invalidated post-award by the same methods. Gifts and hospitality for public officials during the tender process may also not be illegal, but are a grey area often subject to abuse as a form of bribery to influence tender decisions.<sup>50</sup>

Education, training, regulation, and accountability are key to fighting corruption. Getting the message across that bribery and corruption distort markets and causes governments and donors to purchase lower quality books at higher costs is a major part of preventing corrupt activity. Training industry players in basics such as how to accurately complete tender documents, making the process more transparent, and providing for functional and fair complaint and redress mechanisms are all key elements in improving the credibility of the procurement process. In addition, developing and enforcing sanctions, including publicly naming those involved in corruption<sup>51</sup> in procurement can serve as deterrents. For example, the five leading Multilateral Development Banks—African Development Bank, Asian Development Bank, European Bank for Reconstruction and Development, Inter-American Development Bank, and the World Bank—have an agreement that if one bank debars a company, cross-debarment by the other banks will follow.<sup>52</sup> Donor officials need to make addressing corruption a priority in procurement processes.

- **MAJOR EXPECTATIONS/IN-COUNTRY ISSUES TO BE ADDRESSED**

Information from submitted country industry profiles and other sources indicate that there are wide disparities between countries in regards to capacity in the book supply chain.<sup>53</sup> Intervention by GBA should therefore be tailored to each country’s context. For maximum impact, attention and support should target specific points that show weakness. The table below highlights major expectations and key issues reported in written submissions or stated in interviews.

MAIN INTERVENTIONS IDENTIFIED		
INTERVENTION	DESCRIPTION	COMMENT



<b>Policy</b>	This is the framework that creates conditions for conducive creation, development, production, distribution and use of books	A pervasive problem across the continent, even in countries that hitherto made major strides over the years. The issues range from state restrictions, taxes on books, and the non-prioritization of books and reading. GBA should share knowledge about supportive policies.
<b>Capacity Building</b>	<p>This will focus on development of skills in the areas gaps were identified:</p> <ul style="list-style-type: none"> <li>• Writing , illustrating, and designing for children</li> <li>• Editing</li> <li>• Open access and OER</li> <li>• Digital publishing</li> <li>• Publishing for the visually-impaired</li> <li>• Building relations with government</li> </ul>	Capacity to develop age and level appropriate materials is essential, so is the need for publishers to develop the ability to navigate the digital revolution. To lobby governments effectively, better relations are necessary.
<b>Implementation</b>	<p>What in-country mechanism will work best for the successful implementation of a PC? Suggestions made include:</p> <ul style="list-style-type: none"> <li>• ADEA and World Bank could be the implementing agencies for some of GBA's activities. For example, ADEA seems better suited for policy dialogue, and the World Bank would have more experience in procurement.</li> <li>• Technical experts for capacity building may be engaged locally or from outside a country, with NGO support.</li> </ul>	This is one area where much attention needs to be paid to country context. Additionally, there may be opportunities to hold seminars/workshops on regional basis.
<b>Procurement and Supply</b>	This will involve creating a fair and transparent process for identifying suitable titles, purchasing, and delivering to target readers.	Simplification of documentation and transparency will enhance the integrity of the process. Tendering and award of contracts give room for much corruption as well as frustration for bidders.
<b>Sustainability</b>	The main question asked in different ways by almost every publisher was, " <i>Will this be a one-off intervention (purchase) or will GBA work with the industry over a longer period,</i> " say 3-5 years, to facilitate assured purchases, real growth and long-term sustainability? GBA should highlight this to organizations that work with or intend to work with local publishers in book provision.	For significant impact, the education sector must have long-term, sustainable funding just as health and agriculture sectors have. "Imagine what would happen if the health sector would say, 'we'll buy medication this year, but can't say if we will do so next year or the year after' Predictability has a positive effect on keeping costs low. We take care of our physical health and neglect our intellectual health." <sup>54</sup>

## INCENTIVES TO ENCOURAGE PUBLISHER PARTICIPATION

One issue that cuts through all profiles received and discussions with stakeholders is that of low purchases of books, whether textbooks or general/supplementary reading books. In other words, any intervention should include increased opportunity for publishers to sell their books. The dearth of data on national sales figures for textbook or supplementary reading books means this point does not have empirical support. However, it is generally agreed that the bulk of profits come from the textbook market. The profits are then partly invested in production of general/supplementary readers, either for use in schools or for open market purchase by parents. In *Learning and teaching materials: policy and*

*practice for provision*, a DFID practice paper, the authors state: “Private sector textbook publishing in many developing countries has a good track record of support for local children’s and general book publishing out of the profits from the textbook sector. As a result, it actively supports the development of local culture and provides support for literacy in local, regional and international languages.”<sup>55</sup> Low textbook purchases result in less available investment in supplementary readers.

Stakeholders’ expectations include:

“GBA/PC activities should eventually lead to purchase of books.”<sup>56</sup>

“Large purchases to revitalize the industry, and add capacity building,” said the head of a national publishers association.<sup>57</sup>

“Be practical; [publishers are] interested in learning, but they’re also business people with time constraints. They should see value in coming together and meeting regularly, and the Alliance can assist with communication and facilitators to moderate sessions, and opportunities to regularly come together at local, national, regional level”<sup>58</sup> to deliberate and strategize on matters of mutual interest, particularly how to grow the industry and improve availability and accessibility to books for children.

“... How to make it profitable for publishers to produce books for children and young adults, how the supply chain works to make this worthwhile for publishers. Help the industry to move toward self-sustaining.”<sup>59</sup>

“Advance market commitments, especially for local language books. Opportunity for sales is an overarching interest of publishers.”<sup>60</sup>

## **MINORITY LANGUAGES**

The situation regarding reading books in mother tongue languages calls for additional targeted efforts. Though spoken by large numbers in a country and sometimes across national borders, and even used for instruction in schools, there are languages that have few books. A wide-ranging recent survey of children’s reading materials in African languages in eleven countries, undertaken by RTI International and published by USAID, focused on materials in African languages relevant for the early primary level (kindergarten through Primary Grade 3), and which included textbooks and supplementary reading materials. However, it reported a paucity of titles in many languages.<sup>61</sup>

The survey stated: “Although materials in 200 African languages were found, most languages are represented by very few titles: 40 languages have only one title each, 42 languages have between two and five titles, and 59 languages have between six and 20 titles. The three languages with the largest number of published titles also have relatively large speaker populations: Kiswahili (808 titles for an estimated 100 million speakers across several countries), Chichewa/Nyanja (509 titles for an estimated 10 million speakers in Malawi, Zambia, and Mozambique), and Amharic (366 titles for an estimated 26 million speakers in Ethiopia).”<sup>62</sup>

Further, research conducted by PEN International in Kenya, Haiti, Serbia, and Nigeria found that “there is still a conviction in the mainstream publishing industry that it is primarily viable to sell books in dominant languages, and that a major obstacle to establishing and sustaining strong minority-language publishing industries is the way that minority languages are valued locally and nationally.”<sup>63</sup> The PEN report stated, “Our research across the four countries found that the major reason cited for a lack of educational projects and the book industry in minority languages is the absence of any financial return on these products. In the post-colonial areas of Africa and the Caribbean, the publishing industry is only

beginning to explore the huge potential of the capacity to ‘speak’ the language of readers and to seek to work with their worlds in order to open up ‘new’ markets, even though they exist within the same countries. ... The chain of prejudice is very long and highly complex, and it is therefore impossible to resolve the marginalization issue with short-term projects.”<sup>64</sup> The study argues that, under the right circumstances, a readership can be fostered, even created. “In order for the book market in minority languages to be viable, even possible, we must remove the barriers that exclude wide swathes of the population from education in their local language and prevent its normalized use in their daily lives.”<sup>65</sup>

Despite little activity in this area, books in mother tongue languages have potential for cross-border cooperation in publishing. Swahili in East Africa, Hausa, Fulfulde, and Wolof in West Africa easily come to mind. Efforts will be needed to standardize cross-border orthography and to bring publishers together to explore ways of working together to meet this need.

## **WHAT WORKED IN THE PAST, AND WHAT HAS NOT?**

Hans Zell has catalogued 24 Pan-African and regional book professional organizations, groups, and networks in Sub-Saharan Africa that were proposed for or operated in Africa to address some of the issues of interest to the GBA.<sup>66</sup> Of these, some of which were begun in the 1970s, only five of them are still active at this time, of which two are organizations based in Europe. “Most of the rest represent a whole graveyard of initiatives that were started in the past, usually launched with great fanfare and grandiose mission statements, only to fall at the first hurdle, or to cease operations when initial donor support came to an end.”<sup>67</sup> Zell suggests the following factors for their failure.

- A failure of collective will, and a lack of the necessary commitment from the main intended stakeholders.
- A low degree of professionalism, lack of vision, and/or weak management.
- Donor or other funding ceased, and activities came to a standstill.
- Despite their best intentions and a goal of working for the common good, there was, in practice, an unwillingness to share information among the different stakeholders, for example professional experience and know-how, much less marketing intelligence or knowledge of digital/ICT skills.
- There was also an absence of visibility for a number of these organizations and networks: to make their activities widely known, through appropriate publicity, and (for those organizations that started in more recent years) through an attractive and regularly updated website, a presence on relevant social and professional media, and regular publication of an online newsletter.<sup>68</sup>

It was not in the scope of this research to find out the reasons why the aforementioned organizations did not survive and flourish or were not sustainable in the longer term, although interviews with stakeholders yielded anecdotal snippets. For example, it has been asserted that APNET did not survive financially because member associations were unwilling to or failed to contribute to support it.<sup>69</sup> Such knowledge would help to guide endeavors such as the GBA. Considering Zell’s analysis, then, it is understandable why this research found that publishers and other players in the industry are enthusiastic about working with GBA, but caution against short-term focus by any external intervention. They emphasized the need for long-term focus, and that implementation cycle should be adequate to ensure achievement of overall objectives and specific plans. It is instructive that the “new” APNET currently focuses on targeted workshops and discussions on how to respond to current issues facing the book publishing industry and how to strengthen it.<sup>70</sup>

## THE AFRICAN PUBLISHING COLLABORATIVE: A FRESH START

The need to find new ways of working together was expressed in interviews with senior industry players, and also strongly during the Regional Workshop for African Book Industry Stakeholders that brought together in Abidjan, La Côte d'Ivoire nearly 70 key stakeholders in the African book publishing industry from 22 Francophone, Anglophone and Lusophone African countries, and 12 representatives of development partners.<sup>71</sup> In fact, participants at the workshop unanimously adopted the concept of an African Publishing Collaborative—an action plan around five pillars for advocating and establishing innovative and effective mechanisms within countries for the production, acquisition, distribution, management and use of textbooks and other reading materials in national languages. The 5 pillars of intervention and their key objectives are:

- **Advocacy, policy dialogue and reading promotion:** Create awareness for the need of national book and reading policies in ADEA member countries by 2020 and provide technical assistance for that purpose.
- **Training and research:** Establish an online training platform for the African book industry and enable national associations to develop effective communication plans with policy makers.
- **Local languages:** Facilitate efforts toward standardizing cross-border and international orthography; and encourage and support linkages and collaborations for local language development.
- **Publishing partnerships:** Foster close partnerships within the publishing industry in countries, across borders and with outside agencies; and catalyzing the development of a stronger, versatile, economically sustainable industry, including encouraging the creation of conducive conditions that facilitate the active exchange of skills and knowledge in the selling and buying of rights, co-publishing, and co-editions across borders.
- **Bookselling and distribution:** Strengthen capacity building for booksellers through a standardized curriculum; and develop sustainable models for bookselling and distribution, including the use of new technology.

## PITFALLS TO AVOID

The following was gleaned from interviews:

**Short, unrealistic timeframe to engage the publishing sector and government:** For sustained growth in the industry, the ad hoc interventions of the past, particularly the one-off book purchases needs to give way to a more programmatic approach that addresses the weaknesses in the book supply chain. Save the Children has been working with the publishing sector in Rwanda for 4 years, and projects 3 more years of assistance to get the industry to become self-sustaining. Reading CODE has been working in Sierra Leone and Liberia for at least 5 years. These two programs are externally funded and one question that publishing collaboratives have to answer is how they will finance their activities.

**Creating dependence:** This can come through how capacity building programs are designed and/or implemented. There needs to be a balance between needed assistance and dependence. As organizations such as APNET experienced in the past, over-dependence on external funding would severely undermine efforts at sustainability.

**Working outside country systems:** In the mission to get relevant quality books into the hands of children, the temptation to create a completely new system may come into play when systemic

difficulties seem insurmountable or frustrate pace of change. This may include the urge to sidestep key government officials who take entrenched positions against needed change.

**Risks:** These may come in the form of in-country obstacles, institutional systems capacity, and reputational issues. Publishing collaboratives might have to deal with counterproductive government policy, which may have created or which might create a hostile working environment. Political in-fighting among industry players (“old guard vs young tigers”), especially attempts to hijack leadership of the collaborative by individuals or factions to promote or achieve selfish interest, can cripple activities of a collaborative. There can also be inertia caused by lack of cooperation among industry players, and between industry representatives and government officials. In some countries, the industry may have low capacity, and the expectation of delivering to fulfill the country’s book needs may prove unrealistic. In interviews, book industry stakeholders expressed frustration over repeated requests for information without concrete action or assistance following, what one described as a fading of hopes raised since meetings and discussions about providing more and better books for children began in 2012. In order not to risk negative reputation, the Alliance needs to demonstrate that it is serious in seeing action “on the ground.”

## **BEST PRACTICES FROM “THE FIELD”**

The Alliance does not need to reinvent how to get publishing collaboratives organized in different African countries. It can recommend to publishing collaboratives that they review and adapt successful models such as Reading CODE<sup>72</sup> and Save the Children’s “whole chain” approach to book supply in Rwanda that addresses “every stage of a book’s journey from publisher to child.”<sup>73</sup> Reading CODE (see Annex 7) works with local teachers, librarians, writers, and publishers to support and sustain the development of literacy learning in K-12 schools. It is currently being implemented in eight African countries: Ethiopia, Ghana, Kenya, Liberia, Mali, Mozambique, Sierra Leone, and Tanzania. In Rwanda, Save the Children has since 2015 worked with education ministries, publishing industry stakeholders, education boards, schools, booksellers, and libraries with the goal of cultivating vibrant national publishing industries and providing a steady stream of new local language titles, and strengthen existing systems. Annex 8 details the steps that Save the Children went through, which might be adapted and contextualized to fit a country’s needs.

## **POTENTIAL PARTNERSHIPS**

Since November 2017, three major conferences and workshops have been held in Africa: (i) High Level Regional Conference: The Publishing Industry in Africa and its Role in Education and Economic Growth, organized by the World Intellectual Property Organization (WIPO), and held in Yaoundé, Cameroon, November 22-23, 2017; (ii) Regional Workshop for African Book Industry Stakeholders, organized by ADEA and GBA, and held in Abidjan, La Côte d'Ivoire (Ivory Coast), January 22-25, 2018; and (iii) the International Publishers Association’s first ever African Regional Seminar held in Lagos, Nigeria, May 9, 2018. These high level meetings on the African book industry point to the need for the principal actors and organizers dialogue and harmonize their efforts, since they all plan to continue engaging the industry, often represented by the same individuals, at different fora.

- **Publishing:** The African Publishers Network (APNET), International Publishers Association (IPA), World Intellectual Property Organization (WIPO), the United Kingdom’s Department for International Development (DFID), UNESCO, United States Agency for International Development (USAID), and the World Bank.

- **Translation work:** SIL ([www.sil.org](http://www.sil.org)) is a world leader in this regard. Since 1934, it has served language communities worldwide, building their capacity for sustainable language development, by means of research, translation, training and materials development. SIL offers resources such as fonts, publications, and tools for language development. Its award-winning Bloom software ([www.bloomlibrary.org](http://www.bloomlibrary.org)) is currently being used to train writers and editors in Africa to create simple books and translate them into multiple languages.
- **Distribution:** As regards international distribution, the African Books Collective<sup>74</sup> (ABC) have the experience, expertise, and marketing know-how. Founded, owned, and governed by a group of African publishers, ABC is non-profit making on its own behalf, but seeks to generate sales income for its very large number of participating publishers, and providing wide international visibility for indigenous African publishing output, including children's books.
- **Digital:** Here are some examples of organizations working in Africa.
  - i. *African Storybook* ([www.africanstorybook.org](http://www.africanstorybook.org)), based in South Africa, offers a digital platform that provides “open access to picture storybooks in the languages of Africa for children’s literacy, enjoyment and imagination.” Its website has tools to assist in developing stories—including translation and adaption, and using books with children.
  - ii. *Benetech* ([www.benetech.org](http://www.benetech.org)) is using innovative education software and services to transform how people with disabilities access information and how the publishing industry creates content accessible to all. One of the programs Benetech has brought to scale is Bookshare ([www.bookshare.org](http://www.bookshare.org)), the world’s largest library of e-books for people who cannot read traditional books due to disabilities like blindness, low vision, and dyslexia. To date, Bookshare has delivered over 11 million e-books to people with disabilities in 80 countries.
  - iii. *eKitabu* ([www.ekitabu.com](http://www.ekitabu.com)), based in Kenya, designs content with users and partners from public and private sector—to increase accessibility and lower the cost of content for quality education—sustainably and at large scale. Through its open architecture, global collection of e-books and ecosystem partners, eKitabu dramatically lowers the cost of delivering accessible content for quality education in local languages. Since founding in 2012, the organization has brought digital content to over 1,000 schools across all 47 counties of Kenya and 13 African countries.
  - iv. *Worldreader* ([www.worldreader.org](http://www.worldreader.org)): Wherever possible, the organization builds on digital platforms and mobile connectivity in the developing world to make books available to children and families who need them the most. Worldreader’s LEAP 2.0 partnership<sup>75</sup> with the Kenya National Library Service to provide a digital reading platform for 61 national public libraries in the country offers useful lessons for planning and implementing such collaboration.
- **Policy dialogue:** The following are key players involved with policies relating to education and books in Africa.
  - i. *Association for the Development of Education in Africa-Working Group on Books and Learning Materials (ADEA-WGBLM)*: ADEA is a forum for policy dialogue on education policies and a partnership between African education and training ministries in Africa and their technical and funding partners. ADEA is also a network of policy-makers, educators, and researchers, which acts as a catalyst for reforms and promising policies and practices through the pooling of ideas, experience, lessons learned and knowledge.



- ii. *Ministry of Education officials:* Within a country, they are in charge of policies (such as curriculum and language of instruction) and practices (such as procurement of books) which directly impact the book publishing industry.
- iii. *Development Partners:* By virtue of their relationship with government officials, agencies and multilateral institutions such as DFID, Norad, UNESCO, USAID, World Bank can and do influence policies.
- iv. *Institutions (including NGOs) working in the field:* International NGOs such as CODE, Room to Read, Save the Children, SIL, World Vision can contribute effectively to policy dialogue.

## CONCLUSION

Africa's young population, efforts to revive the African Publishers Network, and renewed interest in the African book publishing industry, as demonstrated by three recent high-level meetings in Yaoundé, Abidjan, and Lagos offer a unique opportunity to holistically tackle issues that militate against growth. Governments need to see and treat the industry as a partner in education, social transformation, and economic development. In seeking to address the availability and access to books development partners and international NGOs need to assist and partner effectively rather than undermining the local book publishing industry. If Africa's children are to have the books they need to read, all interested parties within and outside Africa should curtail their fragmented approach and begin to work together. The Global Book Alliance can spearhead this process.

## RECOMMENDATIONS

A task of the magnitude that GBA has undertaken to fulfill needs the support, assistance, and cooperation of partners and beneficiaries. From the information gathered by this research, the following recommendations can be derived.

### 1. **Catalyze formation or launch of the publishing collaboratives.**

Ideally, publishing collaboratives should self-organize. However, political and business conditions in some countries may render this very difficult to achieve. Therefore, given GBA's declared intent that it "stands ready to shepherd those efforts by giving them direction, focus, and vision,"<sup>76</sup> the Alliance should develop guidelines to enable it to determine the readiness of a country to launch a publishing collaborative (see Annex 5), and the TAG could assist in drawing up a list of countries for engagement. Once a shortlist is drawn up, depending on the country context, GBA could facilitate the coming together of publishing industry representatives. Save the Children's experience in Rwanda (Annex 8) has demonstrated that the intervention of an external partner can help to bridge differences, foster ongoing dialogue, and develop/strengthen working relationships in the industry and between the industry and government officials.

### 2. **Promote development of new titles**

There is some merit in creating financial incentives for PCs to self-organize to facilitate the development of content for which they would receive guaranteed orders, such as in buy-back schemes. So, instead of investing in the inputs to the PC, the GBA could invest in their outputs—PCs would need to come up with credible plans demonstrating how the industry would produce good content and then GBA will fund them. That way, at least, the money would go directly into creating value in the form of new products, without which publishing cannot thrive. New titles should include books in mother tongue and minority languages.

### 3. **Address capacity building**

To address this overarching need, the GBA should keep abreast with issues and partner with the local publishing industry in conducting workshops and other training on identified areas pertinent to local context—the most mentioned being development of new authors, illustrators, and designers; editing; digital publishing (e-books); open educational resources; negotiation skills for policy dialogue; responding to procurement opportunities (tenders); and business planning. GBA should develop a matrix of training to deal with identified gaps in capacity. The Technical Advisory Group for Publishing Collaboratives (TAG) can assist to select for engagement some of the countries that have responded to this research, and to put together a database of experts, categorized by specialty and language, to help PCs in identifying suitable facilitators.

### 4. **Encourage mini-initiatives**

As PCs come up with ideas to address weaknesses in the local book supply chain, they might need to validate theories for change. GBA should provide templates for:

- *Proof of concept:* Pilot the concept of national language title development, production, and supply of lower grade readers to gain real world assessment of the technical and financial viability of the concept.

- *Testing impact and delivery:* Test the concept for social impact, improved outcomes and/or market viability, as well as operational refinement to build paths to sustainability and scale.

The TAG can act as a clearing house or selection panel to screen and offer advice for implementing these mini-initiatives and other activities developed through the PCs that will support the dissemination and use of relevant, quality children's books.

## 5. **Create repository of knowledge**

In addition to technical assistance that may be sourced externally, PCs would benefit from a “one-stop shop,” a website for resource material such as information on:

- Best practices: For working with authors, illustrators, and designers; Negotiation skills, etc.
- Toolkits: For example, “How to market books effectively to the government” or “How to pool orders to increase cost-efficiency.
- Business planning tools.

## 6. **Improve data collection and documentation**

To address the chronic issue of lack of reliable data, PCs need to be part of the frontline, working with national libraries and statutory agencies to collect and curate data relating to the book publishing industry: number of new titles published annually; number of books sold (copies and estimated value)—disaggregated by children, language; etc. GBA should provide guidance on how to establish knowledge management in a PC. A concerted effort in a country over five years, for example, can assemble a wealth of knowledge that can be shared with other countries.

## 7. **Take short-term action**

Industry stakeholders expressed frustration over repeated requests for information without concrete action following, what one described as a “fading of hopes raised” since meetings and discussions about providing more and better books for children began in 2012. GBA needs to demonstrate seriousness in seeing action “on the ground.” For immediate action, TAG should recommend countries for engagement in formation of PCs. The earlier GBA is seen as a trusted partner by the industry, the better.

## 8. **Tackle corruption in procurement**

GBA should advocate for and promote transparency, fairness, and timeliness in procurement, and work with the industry, donors, and implementing agencies to achieve these. The use of well-known best practices in book procurement, standardization of documentation, adherence to schedules, and transparency in bid evaluation for procurement are critical first steps to enhance the integrity of the process.

## 9. **Establish financing for long-term engagement with the publishing industry**

To catalyze sustained growth in the book publishing industry, GBA should pursue partnering with the private sector and donors to develop funding mechanisms, in addition to technical assistance. This can go hand in hand with high level policy dialogue and a clear plan of action on issues such as the development of a national book and reading policy.

## 10. **Develop synergies among key international players**

Given the increasing coalescing of ideas and efforts regarding the African book publishing industry, it is important that GBA considers meeting with the key international players involved—ADEA (policy dialogue); IPA (commercial publishing), WIPO (intellectual property), and UNESCO (open educational resources)—to identify synergies, explore ways of collaborating to minimize duplication, and to enhance success. For example, WIPO’s “Action Plan - Publishing Industry and Access to Educational Material”<sup>77</sup> prepared following the Yaoundé conference sets out tasks quite similar to the “Five Pillars” agenda agreed at the GBA/ADEA meeting in Abidjan. The IPA will hold its next African publishing industry seminar (follow-up from Lagos) at the 2019 Nairobi International Book Fair. GBA should consider working towards holding a meeting with these players there, if unable to do so earlier.

## **II. Publicize the Alliance more widely**

In the course of conducting this research, it came to light that the African publishing industry generally knows little about the Global Book Alliance and its mission. The Alliance therefore needs to promote itself better and more widely than has been done, by leveraging attendance at major book events. Well-established international book fairs in Lagos, Nigeria (May); Accra, Ghana (August), Nairobi, Kenya (September), and Dakar, Senegal (December) offer excellent opportunities for promotional activities, engaging firsthand with industry professionals, and networking with development partners. In this regard, it is important that information about the Alliance is made available in major languages on the continent.

## ANNEXES

### ANNEX I: INTERVIEW QUESTIONS FOR STAKEHOLDERS

1. Are the challenges that publishers face today different from the ones they confronted thirty years (or 20 years) ago? What were they then and what are they now?
2. Are there national interventions that can promote a sustainable publishing industry, such as national book policies, preferential customs, and VAT policies?
3. Generally, what are the motivations and barriers to publishers and other key stakeholders in the publishing sector—including impacts of government policies related to books, customs, VAT, etc.?
4. What would publishers expect from a PC to justify their participation? By the same token, what would constitute publisher “buy-in,” i.e. How can we incentivize publishers to participate in the PC?
5. How can we make publishers’ business profitable/sustainable in the long term? In other words, what are the barriers to profitability? What can we do (i) in the short term and (ii) in the long term to catalyze/stimulate (the path to) profitability?
6. What should be the scope of the PC’s activities?
7. Should the PC(s) be national, sub-regional, regional or global?
8. Who should comprise the PC membership? Is there interest in a PC that includes both commercial and NGO publishers? How should governments and funders participate in a PC, if at all?
9. Should the PC be a part of an existing organization? Who would lead it? What are suitable governance and funding structures?
10. Any other useful thoughts to help structure the PC?



## ANNEX 2: QUESTIONS FOR COUNTRY PROFILE OF PUBLISHING INDUSTRY

### ANNEX 2.1: ENGLISH VERSION

#### PROFILE OF THE BOOK PUBLISHING INDUSTRY

1. What are the 5 major issues facing the publishing industry in your country? List them order of importance/seriousness, with 1 being the highest and 5 being the lowest.
2. What are the top 3 capacity building needs for which you require assistance to address?
3. Provide a brief statement of the country context in which the publishing industry operates, including economic (including general outlook and taxes); education (children in basic education—up to end of secondary school, literacy level, policies); and library network (state number and how well they are operating—budget for purchases and patronage). Limit the statement to 300 words maximum.
4. Briefly describe the bookselling sector, commenting on infrastructure (number of bookshops, distribution outlets), and feasibility and use of electronic platforms, if applicable. Include information such as book promotional activities (adverts, reading tents, VIP/celebrity promos), literary awards, and book fairs.
5. What are the impediments, if any, for cross-border book trade/distribution? What, in your opinion, can be done to improve the situation?
6. How many registered publishers are there? \_\_\_\_national; \_\_\_\_multinational; \_\_\_\_NGO.
7. How many are actively publishing? \_\_\_\_national; \_\_\_\_multinational; \_\_\_\_NGO.
8. State number of titles produced in print for \_\_\_\_ 2017; \_\_\_\_ 2016; \_\_\_\_ 2015.
  - State number (or percentage) of above titles produced in local languages for \_\_\_\_ 2017; \_\_\_\_ 2016; \_\_\_\_ 2015.
  - State number (or percentage) of above titles produced in English \_\_\_\_; French \_\_\_\_; official/national language (state) for \_\_\_\_ 2017; \_\_\_\_ 2016; \_\_\_\_ 2015.
9. How many publishers produce textbooks?
  - State number of textbook titles published in print for \_\_\_\_ 2017; \_\_\_\_ 2016; \_\_\_\_ 2015.
  - State number of textbook titles published electronically (e-books) for \_\_\_\_ 2017; \_\_\_\_ 2016; \_\_\_\_ 2015.
10. How many publishers produce supplementary readers?
  - State number of supplementary reading titles published in print for \_\_\_\_ 2017; \_\_\_\_ 2016; \_\_\_\_ 2015.
  - State number of supplementary reading titles published electronically (e-books) for \_\_\_\_ 2017; \_\_\_\_ 2016; \_\_\_\_ 2015.
  - What percentage of supplementary readers are targeted to early grades, that is, from Birth to Grade (Primary Class) 3?
  - What are the 3 main barriers to producing early grade materials?

11. Does the Ministry of Education purchase textbooks for schools? \_\_\_\_Yes \_\_\_\_No.
- If yes, how often? \_\_\_\_Yearly \_\_\_\_Occasionally \_\_\_\_Never.
12. Does the Ministry of Education purchase supplementary readers for schools?
- If yes, how often? \_\_\_\_Every year \_\_\_\_Occasionally \_\_\_\_Never.
13. Are publications produced specifically for persons with disabilities? How many are currently available? Who produces them?
- What are the 3 main barriers preventing sufficient publication of these materials?
14. Add any other relevant information.

Country:

Completed by (name/designation):

Date:

**THANK YOU**

## ANNEX 2.2: FRENCH VERSION

### PROFIL DE L'INDUSTRIE DU LIVRE

1. Quels sont les cinq principaux problèmes auxquels est confrontée l'industrie de l'édition dans votre pays? Énoncez-les ordre d'importance/gravité, 1 étant le plus élevé et 5 étant le plus bas.
2. Quels sont les trois principaux besoins en matière de renforcement de capacité dont vous auriez besoin d'assistance?
3. Faire un bref exposé du contexte pays dans lequel opère l'industrie de l'édition, y compris économique (dont les perspectives générales et les taxes); éducation (nombre d'enfants dans l'éducation de base jusqu'à la fin de l'enseignement secondaire, taux d'alphabétisation, politiques); et le réseau de bibliothèques (nombre; visiteurs; et le niveau de fonctionnement de leur budget d'approvisionnement). *Limitez la description à 300 mots maximum.*
4. Décrire brièvement le secteur de la librairie, en commentant l'infrastructure (nombre de librairies, points de distribution), la faisabilité et l'utilisation des plateformes électroniques, le cas échéant. Inclure les informations comme les activités promotionnelles de livres (publicités, tentes de lecture, promos VIP/célébrités), les prix littéraires et les foires du livre.
5. Quels sont les obstacles éventuels au commerce et à la distribution transfrontaliers des livres? À votre avis, que pouvez-vous faire pour améliorer la situation?
6. Combien y a-t-il d'éditeurs recensés? \_\_\_\_ nationaux; \_\_\_\_ internationaux; \_\_\_\_ ONG.
  - Combien publient régulièrement? \_\_\_\_ nationaux; \_\_\_\_ internationaux; \_\_\_\_ ONG.
7. Nombre de titres publiés en \_\_\_\_ 2017; \_\_\_\_ 2016; \_\_\_\_ 2015.
  - Nombre (ou pourcentage) des titres ci-dessus qui sont publiés en langues nationales pour les années \_\_\_\_ 2017; \_\_\_\_ 2016; \_\_\_\_ 2015.
  - Nombre (ou pourcentage) des titres ci-dessus qui sont publiés en anglais \_\_\_\_; français \_\_\_\_; langue officielle \_\_\_\_; langue nationale \_\_\_\_ pour les années \_\_\_\_ 2017; \_\_\_\_ 2016; \_\_\_\_ 2015.
8. Combien d'éditeurs scolaires existe-t-il?
  - Nombre de manuels scolaires publiés en 2017 \_\_\_\_; 2016 \_\_\_\_; 2015 \_\_\_\_.
  - Nombre de manuels scolaires publiés électroniquement (e-books) en 2017 \_\_\_\_; 2016 \_\_\_\_; 2015 \_\_\_\_.
9. Combien d'éditeurs produisent des matériels complémentaires de lecture?
  - Nombre de titres de matériels complémentaires de lecture publiés pour 2017 \_\_\_\_; 2016 \_\_\_\_; 2015 \_\_\_\_.
  - Nombre de titres de matériels complémentaires de lecture publiés électroniquement pour 2017 \_\_\_\_; 2016 \_\_\_\_; 2015 \_\_\_\_.
  - Pourcentage de matériels complémentaires de lecture destinés aux petites classes, de la naissance à la 3ème année du primaire?

I0. Quelles sont les 3 principales barrières à la production de matériels destinés à la petite enfance?

I1. Est-ce que le Ministère de l'éducation achète des manuels pour les écoles? \_\_\_\_ Oui; \_\_\_\_ Non.

- Si oui, à quelle fréquence ? \_\_\_\_ Annuel; \_\_\_\_ Occasionnel; \_\_\_\_ Jamais.

I2. Est-ce que le Ministère de l'éducation achète des matériels complémentaires de lecture?

- Si oui, à quelle fréquence? \_\_\_\_ Annuel; \_\_\_\_ Occasionnel; \_\_\_\_ Jamais.

I3. Existe-t-il des publications destinées aux personnes vivant avec un handicap? Combien sont disponibles actuellement?

I4. Quelles sont les 3 principales barrières à la production suffisante de ce type de matériels?

I5. Ajoutez toute autre information pertinente.

Pays:

Complété par (nom/titre):

Date:

**MERCI**

### ANNEX 3: SUMMARY OF ISSUES FROM INDUSTRY PROFILES

COUNTRIES											
ISSUE	GHANA	GUINEA	KENYA	MALAWI	MALI	NIGERIA	RWANDA	TANZANIA	TOGO	UGANDA	ZAMBIA
<b>BOOK POLICY</b>											
Absence					✓		✓		✓		
Drafted, not yet approved								✓			
Non-adherence	✓		✓								
Unfavorable				✓							
<b>DISTRIBUTION</b>											
Weak internal book-selling infrastructure		✓							✓		✓
Lack of channels			✓		✓		✓			✓	
<b>STAFFING</b>											
Inadequate professionally skilled personnel		✓	✓		✓	✓		✓		✓	
<b>TAXES (For example, Value Added Tax – VAT)</b>											
On locally produced books			✓								
On books printed externally											✓

On inputs (paper, etc.)	✓			✓
PIRACY	✓	✓	✓	✓
WORKING RELATIONSHIP				
Little or no cooperation from government side	✓			
No consultation by government, negligence		✓	✓	
INACCESSIBLE TEXTBOOK MARKET			✓	✓
PRINTING INFRASTRUCTURE				
Inadequate, low-tech			✓	✓
UNSTRUCTURED BOOK CHAIN	✓	✓		
GOVERNMENT AGENCY NOW MONOPOLY PUBLISHER			✓	✓



## ANNEX 4: SUBMITTED COUNTRY PROFILES

### Annex 4.1 – GHANA

#### PROFILE OF THE BOOK PUBLISHING INDUSTRY

1. What are the 5 major issues facing the publishing industry in your country? List them order of importance/seriousness, with 1 being the highest and 5 being the lowest.

1. Lack of Interest on the part of government agencies to collaborate with players of the publishing industry
2. Non-adherence to government policies on book procurement
3. Huge cost of printing books locally
4. Unsatisfactory reading habit of the populace
5. Unstructured book chain

2. What are the 3 top capacity building needs for which you require assistance to address?

- a. E-publishing
- b. Management of publishing rights
- c. Copy Editing/proofreading

3. Provide a brief statement of the country context in which the publishing industry operates, including economic (including general outlook and taxes); education (children in basic education—up to end of secondary school, literacy level, policies); and library network (state number and how well they are operating—budget for purchases and patronage). Limit the statement to 300 words maximum.

**The Ghanaian Book industry has high prospects but there is the need for both government and industry players to commit to collaborating more to solve major problems of the industry. Major impediments such as cost of production, lack of trust in the book evaluation and procurement process, erratic book procurement regime of government, high taxes etc., will all be a thing of the past if government after broader consultations with the book industry approves a book policy as the blue print for guiding the development and distribution of books in the country. Development partners like USAID, UNESCO, UNICEF, Global Book Alliance etc. should endeavor to involve local publishers in all their efforts to promote literacy rather than working with only state agencies who prefer to keep the Ghana Book Publishers Association in the dark and turn themselves into publishers to produce books. This does not help in building capacity of publishing companies in Ghana.**

**More so, there is the need for publishers in Ghana to shift their attention and focus from textbook publishing alone onto the production of fiction and non-fiction books which have a huge market globally. The textbook market in Ghana is getting choked year-in-year out, due to the number of publishers specializing in the area and the total population of school going children and adults in Ghana. Electronic Publishing could be the game changer if publishers in Ghana want a share of the wider global book market.**

**With regards to libraries, there are 61 public libraries and 10 mobile libraries operating under woefully inadequate government support in Ghana. These public libraries procure books and also get books through donations. In terms of patronage, 101,920 people visited the 7 libraries in Greater Accra Region alone in 2017. This is fairly good but could be improved.**

4. Briefly describe the bookselling sector, commenting on infrastructure (number of bookshops, distribution outlets), and feasibility and use of electronic platforms, if applicable. Include information such as book promotional activities (adverts, reading tents, VIP/celebrity promos), literary awards, and book fairs.

Ghana has about 10 large-scale bookstores with branches across the country and over 1,000 small-scale bookstores and distributors. Most publishers have in-house marketing departments which are responsible for selling and marketing books hence do not rely much on booksellers. Booksellers in Ghana lack adequate infrastructure to promote books hence compelling publishers to set up in-house marketing departments. The promotion of books by booksellers is limited to stocking the books, establishing contacts with clients who patronize their books and attending a few book exhibitions. There are efforts to revive the inactive Ghana Booksellers Association to help structure bookselling business in the Country.

5. What are the impediments, if any, for cross-border book trade/distribution? What, in your opinion, can be done to improve the situation?

Despite the free trade agreement between ECOWAS Countries, language barrier and the non-availability of professional translators are a major impediment for Ghana to take advantage of the book markets in neighboring French speaking Countries. The fear of piracy is also another major impediment that is preventing Ghanaian publishers to sell in even the Nigerian market which is the biggest publishing market in Africa and also an Anglophone market.

The solution to these problems stated above is to build capacity of Ghanaian publishers in publishing rights management. This will enable publishers to take advantage of territorial rights, translation rights etc. for cross border book trade.

6. How many registered publishers are there? ---national ---multinational ---NGO.

Ghana Book Publishers Association (GBPA) has 110 registered publishers. Multinational publishers – 6; NGO – 1 (procures books and distribute to readers); Private national publishers – 99; State publishers – 4.

7. How many are actively publishing? ---national ---multinational ---NGO.

National – 80

Multinational Representatives –3

NGO – 1 (procures books and distribute to readers)

State publishers – 1

8. State number of titles produced in print for ---2017 ---2016 ---2015.

2015 – 301 titles

2016 – 450 titles

2017 – 244 titles

- State number (or percentage) of above titles produced in local languages for ---2017 ---2016 ---2015.

2015 – (13.3%) 40 titles

2016 – (13.6%) 61 titles

2017 – (36.1%) 44 titles

- State number (or percentage) of above titles produced in English ---; French --- ; official/national language (state) for ---2017 ---2016 ---2015.

Number (or percentage) of titles	In English	In French
2015	(95%) 247 titles	(5%) 13 titles
2016	(93.8%) 365 titles	(6.2%) 24 titles
2017	(92%) 184 titles	(8%) 16 titles

9. How many publishers produce textbooks?

80 publishers

- State number of textbook titles published in print for ---2017 ---2016 ---2015.

2015 –277 titles

2016 –400 titles

2017 – 196 titles

- State number of textbook titles published electronically (e-books) for ---2017 ---2016 ---2015.

2015 – 10 titles

2016 – 15 titles

2017 – 12 titles

10. How many publishers produce supplementary readers?

40 publishers

- State number of supplementary reading titles published in print for ---2017 ---2016 ---2015.

2015 –24 titles

2016 – 50 titles

2017 –48 titles

- State number of supplementary reading titles published electronically (e-books) for ---2017 ---2016 ---2015.

2015 – 12 titles

2016 – 20 titles

2017 –22 titles

- What percentage of supplementary readers are targeted to early grades, that is, from Birth to Grade (Primary Class) 3?

2015 – (47%)

2016 – (54%)

2017 – (38%)

- What are the 3 main barriers to producing early grade materials?

- Non-availability of an agreed framework or syllabus for early grade materials

- Non availability of government tender (purchase) for early grade books

- High cost of producing early grade materials

10. Does the Ministry of Education purchase textbooks for schools? ---Yes ---No.

If yes, how often? ---Yearly --- Occasionally --- Never.

12. Does the Ministry of Education purchase supplementary readers for schools?

- If yes, how often? ---Every year ---Occasionally ---Never.

13. Are publications produced specifically for persons with disabilities? How many are currently available? Who produces them?

There Ghana National Association of the Deaf (GNAD) and the Ghana Blind Union help in producing books with the support of some NGOs for their members. Though efforts are underway to ratify the Marakesh Treaty in Ghana, Government's commitment towards providing materials for persons with disabilities has not been encouraging.

- What are the 3 main barriers preventing sufficient publication of these materials?
  - Inadequate attention to the education of persons with disabilities.
  - Difficulty in producing such materials and lack of funding
  - The small market size

I4. Add any other relevant information.

Kindly note, the information provided is limited to data at the Ghana Book Publishers Association which has about 85% of publishers in Ghana as its members. Thus, though the data may not represent the exact situation on the ground, it may not vary so much from the exact situation.

Country: Ghana

Completed by: (Joseph Gyamfi /Ag. Executive Secretary, Ghana Book Publishers Association)

Date: 23rd April, 2018

**THANK YOU**

## PROFIL DE L'INDUSTRIE DU LIVRE

1. Quels sont les cinq principaux problèmes auxquels est confrontée l'industrie de l'édition dans votre pays? Énoncez-les ordre d'importance/gravité, 1 étant le plus élevé et 5 étant le plus bas.

D'une manière générale, la filière livre en Guinée reste fortement confrontée à des obstacles d'ordre économique, politique et institutionnel, mais aussi des problèmes liés à l'inorganisation même du marché du livre et de la faible professionnalisation des acteurs dans les différents maillons de la chaîne. Le nombre moyen de livres annuellement publiés dans le pays est parmi les plus bas du continent, avec moins de 15 nouveautés par an. Il n'est toutefois pas possible de donner une indication précise concernant le volume annuel de livres produits par les éditeurs nationaux à cause aussi bien du nombre réduit d'éditeurs qui publient régulièrement que de l'absence totale de statistiques ou de données fiables dans ce domaine.

2. Quels sont les trois principaux besoins en matière de renforcement de capacité dont vous auriez besoin d'assistance?

Chaque secteur d'activités de la chaîne du livre emploie peu de personnes par unité, avec des niveaux de formation professionnelle généralement peu satisfaisants, dus au fait qu'il n'existe aucun centre de formation aux métiers du livre dans le pays. Raison pour laquelle, le premier besoin en renforcement des capacités est l'appui à la formation pour les principaux acteurs (auteurs, éditeurs, imprimeurs, libraires) et, ensuite, le renforcement des capacités techniques (équipement).

3. Faire un bref exposé du contexte pays dans lequel opère l'industrie de l'édition, y compris économique (dont les perspectives générales et les taxes); éducation (nombre d'enfants dans l'éducation de base jusqu'à la fin de l'enseignement secondaire, taux d'alphabétisation, politiques); et le réseau de bibliothèques (nombre; visiteurs; et le niveau de fonctionnement de leur budget d'approvisionnement). Limitez la description à 300 mots maximum.

Selon les données du recensement général de la population de 2014, la Guinée compte 10 628 972 habitants, dont 5 486 884 femmes, contre 5 142 148 hommes. Le trait marquant de la population guinéenne est sa jeunesse. La population âgée de moins de 15 ans était à 43% en 2015. La densité de sa population est 45,4 habitants/km<sup>2</sup> pour une croissance démographique de 2,9 % par an. L'espérance de vie est estimée à 54,5 ans. Le taux d'urbanisation est d'environ 30% et Conakry, la capitale, regroupe plus de la moitié de la population urbaine du pays.

Sur le plan institutionnel et réglementaire, plusieurs facteurs entravent le développement du livre dans le pays, dont :

- ✓ l'application de tarifs douaniers importants sur l'importation des matières premières à la fabrication du livre et les équipements d'imprimerie ;
- ✓ la non-ratification par le gouvernement des conventions internationales spécifiques, dont les accords de Florence et le protocole de Nairobi ;
- ✓ la trop forte centralisation du mécanisme d'approvisionnement en manuels scolaires et l'implication monopolistique du secteur public à tous les niveaux du processus ;
- ✓ le très difficile voire impossible accès au crédit bancaire par les acteurs du livre ;
- ✓ le manque de mécanismes internes de financement du livre (fonds d'aide à l'édition, subvention aux écoles ou aux communautés (APE), etc.) ;

- ✓ le faible développement des ressources humaines opérant dans les métiers du livre ;
- ✓ l'absence de politique nationale du livre et de politique nationale en matière de bibliothèque et de lecture publique.

4. Décrire brièvement le secteur de la librairie, en commentant l'infrastructure (nombre de librairies, points de distribution), la faisabilité et l'utilisation des plateformes électroniques, le cas échéant. Inclure les informations comme les activités promotionnelles de livres (publicités, tentes de lecture, promos VIP/célébrités), les prix littéraires et les foires du livre.

Comme un peu partout ailleurs en Afrique, le sous-secteur de la distribution et de la diffusion constitue le maillon le plus faible de la chaîne du livre en Guinée. Il n'y a actuellement qu'une dizaine de librairies réellement fonctionnelles, majoritairement de petite taille (seule la *Maison du livre* se distingue par sa taille et le modernisme de ses installations), et toutes installées à Conakry. Les livres importés représentant plus de 80% du volume circulant, des taxes sont appliquées aux livres de littérature générale (de l'ordre de 2,75%), ce qui a une répercussion d'une part sur le prix de vente au public et, d'autre part, sur la disponibilité. Seuls les manuels scolaires bénéficient d'une détaxe, suivant les dispositions de l'Article 42 de la Loi L/94/014/CTRN prévoyant les suppressions des droits et taxes perçus par les services des douanes sur l'importation des livres scolaires à l'exception de la RTL (2%).

5. Quels sont les obstacles éventuels au commerce et à la distribution transfrontaliers des livres?

À votre avis, que pouvez-vous faire pour améliorer la situation?

Les problèmes de tarification intérieure d'un État l'autre, en dehors du contexte de l'UEMOA, ne facilite pas la circulation du livre, malgré les dispositions prises au niveau de la CEDEAO en matière de libre circulation des biens et des personnes. Seules les initiatives et les décisions des gouvernements peuvent améliorer la situation. Mais les professionnels du livres doivent s'organiser dans chaque pays et faire le plaidoyer intérieur face à leurs gouvernements respectifs.

6. Combien y a-t-il d'éditeurs recensés? 08 nationaux; 01 internationaux; 17 ONG.
  - a. Combien publient régulièrement? 03 nationaux; 01 internationaux; 3 ONG.
7. Nombre de titres publiés en      2017;      2016;      2015.
  - Nombre (ou pourcentage) des titres ci-dessus qui sont publiés en langues nationales pour les années      2017;      2016;      2015. *Chiffres non connus, mais assez faibles*
  - Nombre (ou pourcentage) des titres ci-dessus qui sont publiés en anglais 00; français     ; langue officielle     ; langue nationale      pour les années      2017;      2016;      2015.
8. Combien d'éditeurs scolaires existe-t-il? 02
  - Nombre de manuels scolaires publiés en 2017     ; 2016     ; 2015     . *Chiffres non connus, surtout disponibles auprès des différents donateurs qui financent les appels d'offres à la place de l'État guinéen.*
  - Nombre de manuels scolaires publiés électroniquement (e-books) en 2017     ; 2016     ; 2015     . *Chiffres non connus, mais assez faibles*
9. Combien d'éditeurs produisent des matériels complémentaires de lecture?
  - Nombre de titres de matériels complémentaires de lecture publiés pour 2017 12; 2016 06; 2015 inconnu.
  - Nombre de titres de matériels complémentaires de lecture publiés électroniquement pour 2018 12; 2016 inconnu; 2015 inconnu.
  - Pourcentage de matériels complémentaires de lecture destinés aux petites classes, de la naissance à la 3ème année du primaire? *Inconnu*

10. Quelles sont les 3 principales barrières à la production de matériels destinés à la petite enfance?

Les trois principaux problèmes sont : i)- le très faible soutien du gouvernement à ce secteur, ii)- l'impréparation des éditeurs nationaux (seul éditions Ganndal produit pour la petite enfance), iii)- le manque de spécialistes pédagogues de ce niveau d'éducation.

11. Est-ce que le Ministère de l'éducation achète des manuels pour les écoles? ☒ Oui; ☐ Non.

a. Si oui, à quelle fréquence ? ☐ Annuel; ☒ Occasionnel; ☐ Jamais. Il s'agit exclusivement via les appels d'offres financés par l'extérieur

12. Est-ce que le Ministère de l'éducation achète des matériels complémentaires de lecture?

• Si oui, à quelle fréquence? ☐ Annuel; ☐ Occasionnel; ☒ Jamais.

13. Existe-t-il des publications destinées aux personnes vivant avec un handicap? Combien sont disponibles actuellement? Inconnu

14. Quelles sont les 3 principales barrières à la production suffisante de ce type de matériels? Manque de spécialistes et le manque d'intérêt des éditeurs locaux.

15. Ajoutez toute autre information pertinente.

L'absence d'une politique nationale du livre et d'une politique en matière de lecture publique constituent deux obstacles majeurs à un développement de l'industrie du livre en Guinée.

Pays: Guinée

Complété par (nom/titre): Aliou Sow, Directeur général, Éditions Ganndal - Conakry  
<http://editionsganndal.blogspot.com>

Date: 12/08/2018

**MERCI**

## Annex 4.3 – KENYA

### PROFILE OF THE BOOK PUBLISHING INDUSTRY

1. What are the 5 major issues facing the publishing industry in your country? List them order of importance/seriousness, with 1 being the highest and 5 being the lowest.
  - a) VAT on Books
  - b) Piracy
  - c) Distribution Channels of Books
  - d) Editorial Capacity
  - e) Government and NGO interference in the already existing and set policies. i.e NGO's and government involvement in project and program intended to produce and supply learning materials to the detrimental of an already active and vibrant the publishing industry.
2. What are the 3 top capacity building needs for which you require assistance to address?
  - a) Editorial and copyright issues
  - b) Competency Based Curriculum Training
  - c) Digital Publishing and e learning
3. Provide a brief statement of the country context in which the publishing industry operates, including economic (including general outlook and taxes); education (children in basic education—up to end of secondary school, literacy level, policies); and library network (state number and how well they are operating—budget for purchases and patronage). Limit the statement to 300 words maximum.

Kenya has one of the most vibrant publishing industries in the East African region and indeed across Africa. The industry is the mainstay of thousands of Kenyans (including authors, editors, translators, artists, publishers, and many others) directly and indirectly associated with publishing firms and related industries. The growth and vibrancy of Kenyan publishing is mainly due to the policy on liberalisation that frees up the space to competition and offers choice. This has been the case from the late 1990s with respect to the procurement and supply of instructional materials to schools.

Kenya is facing challenges of realizing the intended student to textbook ratio of 1:1 despite billions of shillings in government spending towards this goal. This is largely due to a number of challenges that the Ministry of Education (MoE) has expressed strong interest in addressing. The challenges in the book supply system includes: limited access to books by school going children cost of text book (VAT), inefficiencies in distribution of text books, weak monitoring and evaluation and lack of storage and warehouse facilities in schools

The current system of distribution of books: KICD evaluates materials on submissions by publishers, schools head teachers and Head of departments with the schools boards vet books that they need to purchase after government has remitted funds to schools, schools buy books from bookseller who are also in charge of distributing the books to schools, schools pay the bookseller who in turn pays the publishers. Problems have arisen on the model and KPA believes that education is the basic investment for economic development and books are the basic tools of education, and are also necessary for cultural enrichment. Access to books is therefore vital for success. The problems of procurement at the school level should be addressed in a way that enhances, rather than inhibits or undermines, access to books. Furthermore, it should be a homegrown solution that serves the highest good of the people of Kenya. Recently on a World Bank SEQUIP programme the Ministry of Education request publishers to distribute the books themselves which was a big success has publishers directly distributed books to schools worth Kshs 7.6 billion (US\$75.4 million) leading to an historic Form 1 class having a 1:1 text book ratio on reporting to school.

Kenya is currently undergoing a curriculum review, so far publishers have submitted and most title approved for the competency based curriculum for Pre-primary 1 and 2 and Class 1 to 3. We expect this year to have submissions for class 4 for the competency based curriculum.

Kenya has around 47 libraries meaning that every county has a Kenya National library.



4. Briefly describe the bookselling sector, commenting on infrastructure (number of bookshops, distribution outlets), and feasibility and use of electronic platforms, if applicable. Include information such as book promotional activities (adverts, reading tents, VIP/celebrity promos), literary awards, and book fairs.

Kenya has approximately 3500 bookshops countywide that depend on the publishers. Each county has a chapter which is representative of that area. Each bookshop usually sources for the school to supply books to. Amongst the bookshops there are wholesalers who usually supply books small bookshop.

KPA has engaged BRAND ID on the use of technology to track books distributed and curb piracy. Brand ID supply KPA members with CHECKtags that are stuck to books, and the books can be tracked and verified upon scratching and revealing the number.

Every year Kenya Publishers Association holds two book fairs, one in a specific region and the Nairobi International book fair. Amongst activities at the book fair include, reading tents, children activities and award ceremonies.

For the last 15 years KPA has successfully awarded the Text Book Center Jomo Kenyatta Prize for Literature and the Wahome Mutahi literary award bi-annually aimed at encouraging and rewarding creativity in Kenya.

5. What are the impediments, if any, for cross-border book trade/distribution? What, in your opinion, can be done to improve the situation?

Government bureaucracies is a major impediment on cross boarder trades together with diverse cultural and traditional view. Lack of a curriculum that conforms and cuts across different countries.

6. How many registered publishers are there? 100 national; 3 multinational; ---NGO 4..
7. How many are actively publishing? 40 national; 3multinational; 2 NGO.
8. State number of titles produced in print for N/A 2017; N/A 2016; N/A 2015.
  - State number (or percentage) of above titles produced in local languages for ---2017 ---2016 ---2015.
  - State number (or percentage) of above titles produced in English ---; French ---; official/national language (state) for ---2017 ---2016 ---2015.
9. How many publishers produce textbooks? 40
  - State number of textbook titles published in print for ---2017 ---2016 ---2015.
  - State number of textbook titles published electronically (e-books) for ---2017 ---2016 ---2015.
10. How many publishers produce supplementary readers? 50
  - State number of supplementary reading titles published in print for N/A 2017; N/A 2016; N/A 2015.
  - State number of supplementary reading titles published electronically (e-books) for N/A 2017; N/A 2016; N/A 2015.
  - What percentage of supplementary readers are targeted to early grades, that is, from Birth to Grade (Primary Class) 3? 50%.
  - What are the 3 main barriers to producing early grade materials?
    - a) It is expensive to develop book at this level hence availability of fund would be a big factor to upcoming publishers.
11. Does the Ministry of Education purchase textbooks for schools? ---Yes. Yes through funding sent to schools to purchase text books yearly.
  - If yes, how often? ---Yearly ---Occasionally ---Never.

**Yearly.** This year (2018), the government bought books for the first time directly from publishers under the SEQUIP programme funded by the World Bank. Books that were directly purchased were for Class 7

and 8: Maths, English, Kiswahili and Science; and Form 1 to 4 Maths, English, Kiswahili, Biology, Physics and Chemistry. The new curriculum books will still be bought through the schools and bookshops.

12. Does the Ministry of Education purchase supplementary readers for schools?

- If yes, how often? ---Every year ---Occasionally ---Never

YES, through funds sent to schools, and the schools have the prerogative to choose which readers they buy.

13. Are publications produced specifically for persons with disabilities? How many are currently available?

Who produces them?

Publishers have agreed and given right to ministry of education to produce books for special needs at no cost.

- What are the 3 main barriers preventing sufficient publication of these materials?

Availability of funds and technical knowledge on how to produce the books.

14. Add any other relevant information.

Country: KENYA

Completed by (name/designation): James Odhiambo- Executive Officer

Date: 24/4/2018

**THANK YOU**

**PROFILE OF THE BOOK PUBLISHING INDUSTRY – MALAWI**

1. What are the 5 major issues facing the publishing industry in your country? List them order of importance/seriousness, with 1 being the highest and 5 being the lowest.
  - (1) **Unfavourable government publishing policies**
  - (2) **Lack of political will for government (Ministry) to embrace and support publishing as an economic activity**
  - (3) **Publishers are viewed negatively, never consulted in matters by curriculum development centres, examination boards etc**
  - (4) **Poor reading culture**
  - (5) **Lack of negotiation skills and exposure by publishers on matters surrounding publishing**
2. What are the 3 top capacity building needs for which you require assistance to address?
  - **Negotiation and lobbying capacity with Government on publishing policies**
  - **Training in negotiation skills,**
  -
3. Provide a brief statement of the country context in which the publishing industry operates, including economic (including general outlook and taxes); education (children in basic education—up to end of secondary school, literacy level, policies); and library network (state number and how well they are operating—budget for purchases and patronage). Limit the statement to 300 words maximum.

**The publishing industry in Malawi is a sector which is not recognized as an economic factor. Its contribution as a sector has never been quantified and is therefore deemed negligible. The publishing industry basically survives on textbook publishing which is donor funded. The funding itself is unpredictable.**

**The book chain in the industry is almost nonexistent. Apart from publishers who are very active, bookselling is a role which has also been engulfed by the publishers for their day to day survival; therefore most publishing houses double as publishers and booksellers. The printing sector is mainly for commercial jobs, local printing of books is very expensive. Printing materials are heavily taxed than imported printed books.**

**In Malawi, apart from school libraries in selected schools which have little books, there is a National Library which is a statutory body (quasi government). The institution's annual funding is usually minimal resulting into cuts in funds for book buying. It depends on donor funding or book donations from international organization whose publications are usually irrelevant to the Malawian community.**

**Literacy levels are very low in Malawi resulting from school drop outs, inadequate teaching and learning materials from basic education through to secondary education.**

4. Briefly describe the bookselling sector, commenting on infrastructure (number of bookshops, distribution outlets), and feasibility and use of electronic platforms, if applicable. Include information such as book promotional activities (adverts, reading tents, VIP/celebrity promos), literary awards, and book fairs.

**As indicated above, the book selling sector is dormant, dominated by publishers who double as book sellers. There are 4 publishers who have bookshop outlets in the 3 major cities of the country. A few are briefcase booksellers who shunt from potential buyers (schools) to publishers with an order for their commission.**

**Book fairs take place once a year in schools for textbooks, but recently with funding from HIVOS the association has introduced an annual festival where training workshops, book displays and book launches takes place.**

5. What are the impediments, if any, for cross-border book trade/distribution? What, in your opinion, can be done to improve the situation?

**Piracy has been the main worry of cross border trade and distribution. To a larger extent, not many publications from neighboring countries are relevant to Malawi unless translated or adapted.**

6. How many registered publishers are there? **19**  
- National: **17**  
- Multinational : **2**  
-NGO: **0**
7. How many are actively publishing? **16**  
- National: **14**  
- Multinational : **2**  
-NGO: **0**
8. State number of titles produced in print for ---2017 ---2016 ---2015. **NO DATA AVAILABLE**  
• State number (or percentage) of above titles produced in local languages for ---2017 ---2016 ---2015.  
• State number (or percentage) of above titles produced in English ---; French --- ; official/national language (state) for ---2017 ---2016 ---2015.
9. How many publishers produce textbooks? **NO DATA AVAILABLE**  
• State number of textbook titles published in print for ---2017 ---2016 ---2015.  
• State number of textbook titles published electronically (e-books) for ---2017 ---2016 ---2015.
10. How many publishers produce supplementary readers? **5**  
• State number of supplementary reading titles published in print for ---2017 ---2016 ---2015.  
• State number of supplementary reading titles published electronically (e-books) for ---2017 ---2016 ---2015.  
• What percentage of supplementary readers are targeted to early grades, that is, from Birth to Grade (Primary Class) 3?  
• What are the 3 main barriers to producing early grade materials?  
- **Adequate market to offset publishers investment**
11. Does the Ministry of Education purchase textbooks for schools? ---Yes ---No.  
• If yes, how often? ---Yearly ---**Occasionally (Donor funded)** ---Never.
12. Does the Ministry of Education purchase supplementary readers for schools?  
• If yes, how often? ---Every year ---Occasionally ---**Never**.
13. Are publications produced specifically for persons with disabilities? How many are currently available?  
Who produces them? **NONE**  
• What are the 3 main barriers preventing sufficient publication of these materials? **FUNDING**  
**Publishers are skeptical to publish these materials whose customers would be very minimal (walk in customers) and Government funding is unpredictable comes once in 5 years or so.**
14. Add any other relevant information.

**PLEASE NOTE THAT IT HAS NOT BEEN POSSIBLE TO ANSWER SOME QUESTIONS WHICH REQUIRE DATA BECAUSE THE INDUSTRY IN MALAWI HAS NEVER HAD AN OPPORTUNITY FOR RESEARCH TO QUANTIFY THE PUBLISHING ACTIVITIES AND CONTRIBUTIONS MADE. THE PUBLISHING WHICH TAKES PLACE IS PREDOMINANTLY TEXTBOOK ORIENTED AND THEREFORE THE DATE PRESENT WOULD BE THOSE SUBSCRIBED TEXTBOOKS BY THE MINISTRY. OTHERWISE PUBLISHERS WOULD HAVE**

**MANUSCRIPTS UNDER DEVELOPMENT BUT OFTEN TIMES NOT FULLY PUBLISHED  
BECAUSE OF FUNDING FACTORS.**

Country: Maureen Masamba

Completed by (name/designation): Secretary , Book Publishers Association

Date: 19th November 2018

**THANK YOU**

### PROFIL DE L'INDUSTRIE DU LIVRE

1. Quels sont les cinq principaux problèmes auxquels est confrontée l'industrie de l'édition dans votre pays? Énoncez-les ordre d'importance/gravité, 1 étant le plus élevé et 5 étant le plus bas.

**- Les cinq principaux problèmes que connaît l'industrie du livre au Mali ont pour noms : absence de réseau de distribution, non qualification des acteurs, piraterie, coût élevé des intrants, absence de politique du livre.**

2. Quels sont les trois principaux besoins en matière de renforcement de capacité dont vous auriez besoin d'assistance?

**- Formation d'acteurs qualifiés, structuration d'une réelle chaîne du livre et développement d'un réseau de distribution au plan national et à l'international.**

3. Faire un bref exposé du contexte pays dans lequel opère l'industrie de l'édition, y compris économique (dont les perspectives générales et les taxes); éducation (nombre d'enfants dans l'éducation de base jusqu'à la fin de l'enseignement secondaire, taux d'alphabétisation, politiques); et le réseau de bibliothèques (nombre; visiteurs; et le niveau de fonctionnement de leur budget d'approvisionnement). Limitez la description à 300 mots maximum.

**- L'industrie du livre souffre du manque de reconnaissance du métier comme une activité à part entière différente de l'imprimerie, ce qui est le fruit de l'absence de politique du livre et de textes législatifs couvrant le secteur de l'édition. La preuve le Mali n'a toujours pas ratifié l'accord de Florence pourtant adopté par le conseil des ministres depuis 2014.**

**La TVA est toujours d'actualité même si elle n'est pas systématiquement appliquée sur toutes les productions, et est de 18% tout de même.**

**Le taux d'alphabétisation est autour de 68%.**

**Il existe une centaine de bibliothèques à travers le pays y compris les bibliothèques scolaires ce qui est insuffisant vu la taille du pays. Il n'existe aucune statistique fiable quant au nombre de visiteurs. Très peu de bibliothèques disposent de budget de fonctionnement propre, elles fonctionnent pour la plupart grâce aux dons de livres, lesquels livres sont peu adaptés au contexte socioculturels des lecteurs locaux.**

4. Décrire brièvement le secteur de la librairie, en commentant l'infrastructure (nombre de librairies, points de distribution), la faisabilité et l'utilisation des plateformes électroniques, le cas échéant. Inclure les informations comme les activités promotionnelles de livres (publicités, tentes de lecture, promos VIP/célébrités), les prix littéraires et les foires du livre.

**Il existe une poignée de librairies au Mali, toutes ou presque dans la seule capitale. Les plateformes de vente ne sont pas encore d'actualité, le livre numérique ne faisant pas encore partie de notre culture. Il faut noter la quasi absence d'émission autour du livre à la télévision sur les radios de proximité, toute chose qui font que le livre n'est pas visible et ne se lit peu hors de l'école. En dépit des manifestations organisées par les éditeurs comme les journées nationales du livre au Mali ou la rentrée littéraire du Mali, le SALIBA le livre reste marginal.**

5. Quels sont les obstacles éventuels au commerce et à la distribution transfrontaliers des livres? À votre avis, que pouvez-vous faire pour améliorer la situation?

**- les obstacles sont surtout liées au manque de moyens transport et au peu de fiabilité des distributeurs et des librairies.**

6. Combien y a-t-il d'éditeurs recensés? 41 nationaux; 40 internationaux; 0 ONG. I  
a. Combien publient régulièrement? 10 nationaux; 0 internationaux; 0 ONG.

7. Nombre de titres publiés en \_\_non disponible\_\_ 2017; \_\_non disponible\_\_ 2016; \_\_non disponible\_\_ 2015.
- Nombre (ou pourcentage) des titres ci-dessus qui sont publiés en langues nationales pour les années \_\_non disponible\_\_ 2017; \_\_non disponible\_\_ 2016; \_\_non disponible\_\_ 2015.
  - Nombre (ou pourcentage) des titres ci-dessus qui sont publiés en anglais\_\_; français\_\_; langue officielle \_\_; langue nationale\_\_ pour les années \_\_ 2017; \_\_ 2016; \_\_ 2015.
8. Combien d'éditeurs scolaires existe-t-il? 20
- Nombre de manuels scolaires publiés en 2017 \_\_; 2016\_\_; 2015\_\_.
  - Nombre de manuels scolaires publiés électroniquement (e-books) en 2017 \_\_0\_\_; 2016\_\_0\_\_; 2015\_\_0\_\_.
9. Combien d'éditeurs produisent des matériels complémentaires de lecture?
- Nombre de titres de matériels complémentaires de lecture publiés pour 2017 \_\_; 2016\_\_; 2015\_\_.
  - Nombre de titres de matériels complémentaires de lecture publiés électroniquement pour 2019 \_\_0\_\_; 2016\_\_0\_\_; 2015\_\_0\_\_.
  - Pourcentage de matériels complémentaires de lecture destinés aux petites classes, de la naissance à la 3ème année du primaire?
16. Quelles sont les 3 principales barrières à la production de matériels destinés à la petite enfance?
- Le manque de clients potentiels  
La faiblesse de la production  
L'insuffisance de compétences éditoriale
- a. Est-ce que le Ministère de l'éducation achète des manuels pour les écoles? \_\_Oui;
- b. Si oui, à quelle fréquence ? Occasionnel;
17. Est-ce que le Ministère de l'éducation achète des matériels complémentaires de lecture?
- Si oui, à quelle fréquence? Occasionnel;
18. Existe-t-il des publications destinées aux personnes vivant avec un handicap? Combien sont disponibles actuellement? Non
19. Quelles sont les 3 principales barrières à la production suffisante de ce type de matériels?
- Le manque de marché  
Le manque de compétence éditoriale
20. Ajoutez toute autre information pertinente.

Pays: Mali  
Complété par (nom/titre): Hamidou Konaté  
*Directeur Général Jamana*  
*Président de l'OMEL*  
Date: 27 Juin 2018

**MERCI**

## Annex 4.6 – NIGERIA

### PROFILE OF THE BOOK PUBLISHING INDUSTRY

1. What are the 5 major issues facing the publishing industry in your country? List them order of importance/seriousness, with 1 being the highest and 5 being the lowest.
  - i. **Piracy**
  - ii. **Government negligence of the industry**
  - iii. **Unethical lobbying over book adoptions**
  - iv. **Inadequate manpower base of editorial departments even in the established publishing houses.**
  - v. **Low level of technological know-how and limited equipment in the printing sector of the book chain.**
2. What are the 3 top capacity building needs for which you require assistance to address?
  - i. **Project and editorial management training for editors.**
  - ii. **Training on the use of editing software and on digital publishing.**
  - iii. **Training on the use of designing software**
3. Provide a brief statement of the country context in which the publishing industry operates, including economic (including general outlook and taxes); education (children in basic education—up to end of secondary school, literacy level, policies); and library network (state number and how well they are operating—budget for purchases and patronage). Limit the statement to 300 words maximum.

**Book publishing in Nigeria operates within the tenets of the Libertarian theory. The publisher is at liberty to publish, and the purpose for establishing the publishing firm determines the why, what and how of the business.**

**Essentially, book publishing in Nigeria is a private sector affair and one of the most unregulated industries. There are no pre-determined qualifications or conditions to be met; all that is required to become a publisher is to erect a signpost outside one's office or residence (Ike, 2004).**

**More importantly, publishing is done within the context of a low economy and poor infrastructural facilities. Usual taxation rates operate in the industry, namely income tax, custom duties, and PENCOM. Aside from these, publishers have to pay developmental/educational levies to individual states. In addition, publishers have to pay to register with the Bureau of Public Enterprise.**

**All libraries are government-owned and in a state of disrepair. There is a National Library of Nigeria, with a library branch in Lagos and Abuja. Each state of the federation purportedly has a library too. There are no library budgets per se; only special interventions by the federal or state governments. The libraries enjoy very poor patronage.**

4. Briefly describe the bookselling sector, commenting on infrastructure (number of bookshops, distribution outlets), and feasibility and use of electronic platforms, if applicable. Include information such as book promotional activities (adverts, reading tents, VIP/celebrity promos), literary awards, and book fairs.

**There are many bookshops in Nigeria, though about 80% of them are not standard bookshops in real sense of the word. They take their supplies from the publishers in a 'piece meal' manner. Each publishing house carries out its own promotional activities. None are done by booksellers. Promotional activities include mobile sales, attendance at book fairs, organizing workshops for teachers, and so on. The two main literary awards in Nigeria are the Association of Authors (ANA) awards, and the LNG awards. The Nigerian International Book Fair takes place once every year.**

5. What are the impediments, if any, for cross-border book trade/distribution? What, in your opinion, can be done to improve the situation?



**Apart from the regular border issues, some impediments to cross-border book trade are currency differences, language barrier, curriculum differences and so on.**

6. How many registered publishers are there? **232** national; **4** multinational ---NGO.
7. How many are actively publishing? **232** national; **4**multinational ---NGO.
8. State number of titles produced in print for ---2017 ---2016 ---2015. **NOT AVAILABLE**
  - State number (or percentage) of above titles produced in local languages for ---2017 ---2016 ---2015.
  - State number (or percentage) of above titles produced in English ---; French ---; official/national language (state) for ---2017 ---2016 ---2015.
9. How many publishers produce textbooks? **Virtually all publishers.**
  - State number of textbook titles published in print for ---2017 ---2016 ---2015. **NOT AVAILABLE**
  - State number of textbook titles published electronically (e-books) for ---2017 ---2016 ---2015. **NOT AVAILABLE**
10. How many publishers produce supplementary readers?
  - State number of supplementary reading titles published in print for ---2017 ---2016 ---2015.
  - State number of supplementary reading titles published electronically (e-books) for ---2017 ---2016 ---2015.
  - What percentage of supplementary readers are targeted to early grades, that is, from Birth to Grade (Primary Class) 3?
  - What are the 3 main barriers to producing early grade materials?
11. Does the Ministry of Education purchase textbooks for schools? ---**Yes** ---No.
  - If yes, how often? ---Yearly ---**Occasionally** ---Never.
12. Does the Ministry of Education purchase supplementary readers for schools?
  - If yes, how often? ---Every year ---**Occasionally** ---Never.
13. Are publications produced specifically for persons with disabilities? How many are currently available? Who produces them? **None that I know of.**
  - What are the 3 main barriers preventing sufficient publication of these materials?
14. Add any other relevant information.

Country: **NIGERIA**

Completed by (name/designation): **EMMANUEL ABIMBOLA (EXECUTIVE SECRETARY, NPA)**

Date: **16<sup>TH</sup> JULY, 2018**

**THANK YOU.**

## PROFILE OF THE BOOK PUBLISHING INDUSTRY

1. What are the 5 major issues facing the publishing industry in your country? List them order of importance/seriousness, with 1 being the highest and 5 being the lowest.
  - i. *State publishing books for the government schools*
  - ii. *No book policy in place*
  - iii. *Low reading culture*
  - iv. *Lack of books distribution channels (very few bookstores)*
  - v. *Scarcity of printing infrastructures*
2. What are the 3 top capacity building needs for which you require assistance to address?
  - i. *Publishing process*
  - ii. *Marketing and Distribution*
  - iii. *Building digital books distribution channels*
3. Provide a brief statement of the country context in which the publishing industry operates, including economic (including general outlook and taxes); education (children in basic education—up to end of secondary school, literacy level, policies); and library network (state number and how well they are operating—budget for purchases and patronage). Limit the statement to 300 words maximum.
  - *Publishing in Rwanda is mostly moved by producing textbooks. The biggest consumer of books is the government. Storybooks and trade books are still few. It's only of recent that NGOs started being active in procuring storybooks written in local languages. The trend for textbook is changing though as the government through the Rwanda Education Board has taken up publishing and supply of textbooks to government aided schools.*
  - *Taxes are fairly low. There is no import duty on books. Books are also exempt from VAT.*
  - *Basic education is free from primary to secondary education.*
  - *There are about 30 community libraries scattered around the country. There is one big public library in Kigali. Most community libraries are fairly new and don't have the basic materials and infrastructure needed to operate optimally. Most of them lack a good number of books as well.*
4. Briefly describe the bookselling sector, commenting on infrastructure (number of bookshops, distribution outlets), and feasibility and use of electronic platforms, if applicable. Include information such as book promotional activities (adverts, reading tents, VIP/celebrity promos), literary awards, and book fairs.

*Through Rwanda Children Book Organization, an association founded Rwandan indigenous publishers, exchange forum for writers, illustrators, editors, librarians, translators, teachers and publishers are often organized to continuously improve the quality of books for children and reward the best achievers.*

*Book fairs are organized every year at the national level, and apart from publishers' exhibition stands, visitors can also find a variety of book-related activities such as storytelling, reading, and writing and illustrating contests, face painting, and more. Sometimes Radios, TVs, and newspapers are used to communicate the importance of literature and books especially during the month of September, recognized as the 'Literacy Month' in Rwanda.*

*Through the platform known as Rwanda Reads, all stakeholders of Rwandan book industry meet with the government and development partners to discuss challenges of the Rwandan book industry and try to find solutions.*

*Librarians came together into Rwanda Community Libraries Forum and they work together to serve the people. Bookshops are very few in the country and almost all of them operate in Kigali, the capital of Rwanda. Publishers are doing their best in producing high quality books but the lack of distribution channels is still a challenge. Schools still suffer from the insufficiency of reading materials as the Ministry of education can't afford to buy enough books for them.*

*Writers came together into the Rwanda Writers Federation, a section of the Rwanda Arts Council to promote their works together.*

*With the advancement of technology, some digitalization projects are being tried, but have not yet been established. Some writing contests like 'Andika Rwanda' are organized every year to encourage young writers to write their stories.*

Programs for children's book authors like Abana Writers Café serve as a platform for storytelling, sharing knowledge on children's books and receiving feedback on individual children's writer's projects or works. The only book awards program available is RCBO Awards that rewards outstanding children's books in different categories and genres every year.

5. What are the impediments, if any, for cross-border book trade/distribution? What, in your opinion, can be done to improve the situation?  
*Language barriers*
6. How many registered publishers are there? ---national ---multinational ---NGO.
  - *National publishers – 15*
  - *Multinational publishers – 10*
  - *NGOs publishing – 4*
7. How many are actively publishing? ---national ---multinational ---NGO.  
*All the numbers listed above are actively publishing.*
8. State number of titles produced in print for ---2017 ---2016 ---2015.
  - *About 400 titles were produced from 2015 to 2017*
  - State number (or percentage) of above titles produced in local languages for ---2017 ---2016 ---2015.
    - *Local language titles percentage – about 30%.*
  - State number (or percentage) of above titles produced in English ---; French --- ; official/national language (state) for ---2017 ---2016 ---2015.
    - *Books produced in English – 65%.*
9. How many publishers produce textbooks?
  - *18 Publishers produce textbooks.*
  - State number of textbook titles published in print for ---2017 ---2016 ---2015.
    - *About 250 titles.*
  - State number of textbook titles published electronically (e-books) for ---2017 ---2016 ---2015.
    - *One (1) title.*
10. How many publishers produce supplementary readers?
  - *20 Publishers.*
  - State number of supplementary reading titles published in print for ---2017 ---2016 ---2015.
    - *150 titles.*
  - State number of supplementary reading titles published electronically (e-books) for ---2017 ---2016 ---2015.
    - *50 titles.*
  - What percentage of supplementary readers are targeted to early grades, that is, from Birth to Grade (Primary Class) 3?
    - *60%.*
  - What are the 3 main barriers to producing early grade materials?
    - *Trained authors that know how to write for children are scarce.*
    - *Trained evaluators to evaluate and approve children storybooks are almost non-existent*
    - *No policies to promote early grade reading.*

11. Does the Ministry of Education purchase textbooks for schools? ---Yes ---No.
- Yes.
  - If yes, how often? ---Yearly ---Occasionally ---Never.
  - Yearly.
12. Does the Ministry of Education purchase supplementary readers for schools?
- If yes, how often? ---Every year ---Occasionally ---Never.
  - Occasionally.
13. Are publications produced specifically for persons with disabilities? How many are currently available?  
Who produces them?
- None that we know of.
  - What are the 3 main barriers preventing sufficient publication of these materials?
    - Expertise in producing such materials is lacking
    - Limited market thus not economically viable for commercial publishers
    - Technology for producing the materials is not available in country.
14. Add any other relevant information.

Country: Rwanda

Completed by: Isaie Micomyiza/Secretary General – Rwanda Children Book Organisation and Arthur Barigye – SBD Publishers Ltd.

Date: 24<sup>th</sup> April 2018

**THANK YOU**

## Annex 4.8 – TANZANIA

### PROFILE OF THE BOOK PUBLISHING INDUSTRY

1. What are the 5 major issues facing the publishing industry in your country? List them order of importance/seriousness, with 1 being the highest and 5 being the lowest.
  - a) A working National Book Policy (a draft is there, what remains is its adoption by the Government for implementation)
  - b) Capacity building on part of policy makers and the regulators on the publishing industry. There are big misconceptions that have led to – for example assigning the state-owned Tanzanian Institute of Education (TIE) the role of a publisher and at the same time the role of a regulator of for the educational materials publishing sector. The Government has been channeling all textbooks procurement funds to TIE and TIE has only procured its own textbooks that are poor in quality than those by private publishers. TIE has also been slower in processing for approval manuscripts from private publishers as its staff struggles to improve its textbooks and process new ones.
  - c) Capacity building on part of private publishers on traditional and e publishing aspects.
  - d) Ending of monopoly by TIE
  - e) Procurement funding. The last time a meaningful procurement of books for schools was made was in 2014.
2. What are the 3 top capacity building needs for which you require assistance to address?
  - a) The role and significance of publishing stakeholders – for the Policy makers and regulators
  - b) Editorial, designing, and illustrating high quality manuscripts for different target readers' levels.
  - c) Publishing e books, copy security aspects and selling platforms.
3. Provide a brief statement of the country context in which the publishing industry operates, including economic (including general outlook and taxes); education (children in basic education—up to end of secondary school, literacy level, policies); and library network (state number and how well they are operating—budget for purchases and patronage). Limit the statement to 300 words maximum.

As of 2017, the GDP was about USD 50 billion. The population is about 56 million. The primary education is 6<sup>1</sup> years followed by 4 years ordinary level secondary education (the 6 + 4 defined as basic education) and 2 years advanced secondary education then tertiary (university and colleges) education. There is also a 2-year preschool education.

In 2018, the enrollment for primary schools, grade 1 was 2 million pupils. This puts the number of children under basic education to about 14 million.

The Government has adopted a free basic education policy. Under this policy, the schools do not collect fees from parents and depends solely on the supplies from the Government. This makes all textbooks purchases for basic education being handled by the central government. For the last 20 years to 2015, the private publishing sector supplied high quality textbooks for schools. The books were vetted by the independent Educational Materials Approval Committee (EMAC) set by the Government.

---

<sup>1</sup> The 2014 policy sets primary education to 6 years. The first batch under the new policy will graduate in 2020. In the meantime, there are two policies in play, the 2005 whose last batch of 7 years primary education will graduate in 2020 and the new 2014 policy.

The 2014 policy required that a single core textbook be used in all schools and supplementary textbooks be identified and stocked in the libraries. The policy requires that the single core textbook be identified in adherence to high quality standards. Ministry of Education interpreted this by adding powers to the institute for curriculum development (TIE) for publishing the textbooks and becoming the new regulator – replacing EMAC. TIE is now charged to develop curriculum, prepare syllabuses, build capacity on teaching staff regarding curriculum, publishing text books and vetting educational materials by the private publishers. The Parliament (2<sup>nd</sup> May 2018) directed for a public dialogue on the way forward for the education sector.

The books are exempted from the value added tax. All other taxes for the corporates apply.

4. Briefly describe the bookselling sector, commenting on infrastructure (number of bookshops, distribution outlets), and feasibility and use of electronic platforms, if applicable. Include information such as book promotional activities (adverts, reading tents, VIP/celebrity promos), literary awards, and book fairs.

The number of Booksellers was about 800 in 2015. This number has gone down to about 150 where the active booksellers are 80.

Book fairs were held up until 2014. Plans are to revive the fairs with effect from 2018.

The copy sales through e-book platforms are negligible.

5. What are the impediments, if any, for cross-border book trade/distribution? What, in your opinion, can be done to improve the situation?

No serious impediments. Books from all over the world are being sold in Tanzania. For educational books, local vetting of boosts its marketability.

6. How many registered publishers are there? 35 national; 5 multinational; ---NGO.
7. How many are actively publishing? 15 national; 4 multinational; 2 NGO.
8. State number of titles produced in print for 150 – 2017; 300 – 2016; 400 - 2015.
  - State number (or percentage) of above titles produced in local languages for: 50% - 2017; 60% - 2016; 80% - 2015.
  - State number (or percentage) of above titles produced in English ---; French ---; official/national language (state) English: 50% 2017      40% 2016      20% 2015.
9. How many publishers produce textbooks?
  - State number of textbook titles published in print for 50 2017      190 2016      280 2015.
  - State number of textbook titles published electronically (e-books) for NA 2017; NA 2016; NA 2015.
10. How many publishers produce supplementary readers?
  - State number of supplementary reading titles published in print for 50 2017      50 2016      20 2015.
  - State number of supplementary reading titles published electronically (e-books) for ---2017      ---2016      --2015. NA
  - What percentage of supplementary readers are targeted to early grades, that is, from Birth to Grade (Primary Class) 3? NA
  - What are the 3 main barriers to producing early grade materials?
11. Does the Ministry of Education purchase textbooks for schools? ✓Yes ---No.
  - If yes, how often? ---Yearly ✓Occasionally ---Never.
12. Does the Ministry of Education purchase supplementary readers for schools?

- If yes, how often? ---Every year ---Occasionally ✓Never.
13. Are publications produced specifically for persons with disabilities? How many are currently available?  
Who produces them? NA
- What are the 3 main barriers preventing sufficient publication of these materials?
14. Add any other relevant information.

Please note that these are our best estimates. No formal means of collecting this information was in place.

Country: Tanzania

Completed by (name/designation): Gabriel D. Kitua, Chairman – Publishers Association of Tanzania - PATA

Date: 7 May 2018

**THANK YOU**

## PROFIL DE L'INDUSTRIE DU LIVRE

1. Quels sont les cinq principaux problèmes auxquels est confrontée l'industrie de l'édition dans votre pays? Énoncez-les par ordre d'importance/gravité, 1 étant le plus élevé et 5 étant le plus bas.
  - absence d'une politique nationale du livre devant soutenir les acteurs de la chaîne du livre ou du moins sa mise en application puisque le texte existe (Graines de Pensées a contribué à l'élaboration de cette politique nationale du livre au Togo) ;
  - Problèmes de diffusion/distribution notamment absence de diffuseurs nationaux, absence de circuits de distribution professionnels adaptés à nos réalités pour pallier la pénurie de librairies notamment à l'intérieur du territoire national ;
  - Accès récent et limité des éditeurs locaux à la production de manuels scolaires ; par ailleurs, accès difficile au crédit bancaire pour les éditeurs (situation désavantageuse en cas d'appel d'offres pour la fourniture des manuels scolaires) ;
  - Absence d'un Conseil National du Livre, lieu de concertation entre le secteur public et le secteur privé pour la création d'un environnement favorable à l'industrie du livre.
  - Peu d'ouvrages d'auteurs togolais contemporains au programme dans les collèges, lycées et universités.
  - Cherté relative du livre du fait que tous les intrants nécessaires à sa fabrication sont importés. Absence d'application de l'Accord de Florence que le Togo a pourtant ratifié.
2. Quels sont les trois principaux besoins en matière de renforcement de capacité pour lesquels vous auriez besoin d'assistance?
  - Formation pour tous les acteurs de la chaîne du livre sur le management, la commercialisation, la promotion du livre afin de dépasser les canaux habituels de vente, aller vers les banques, les entreprises ;
  - Création d'une association nationale d'éditeurs
  - Concertation avec les pouvoirs publics pour une meilleure commercialisation du livre.
3. Faire un bref exposé du contexte pays dans lequel opère l'industrie de l'édition, y compris économique (dont les perspectives générales et les taxes); éducation (nombre d'enfants dans l'éducation de base jusqu'à la fin de l'enseignement secondaire, taux d'alphabétisation, politiques); et le réseau de bibliothèques (nombre; visiteurs; et le niveau de fonctionnement de leur budget d'approvisionnement). *Limitez la description à 300 mots maximum.*
  - Population : 7 606 374
  - Nombre d'élèves entrant à l'école primaire : 1 350 000 (2014) avec une moyenne de fréquentation du préscolaire de moins de 20%
  - Nombre d'élèves entrant au collège : 527 950 (2014)
  - Nombre d'élèves entrant à l'université : 64 548 (2014)
  - Taux d'alphabétisation : 84,29% (2017)
  - Bibliothèques du Réseau national de Lecture publique y compris CLAC (Centre de Lecture et d'Animation Culturelle) : 62
4. Décrire brièvement le secteur de la librairie, en commentant l'infrastructure (nombre de librairies, points de distribution), la faisabilité et l'utilisation des plateformes électroniques, le cas échéant. Inclure les informations comme les activités promotionnelles de livres (publicités, tentes de lecture, promos VIP/célébrités), les prix littéraires et les foires du livre.
  - Nombre de librairies : 18 ; mais la moitié d'entre elles proposent surtout des fournitures scolaires et la plupart sont dans la capitale : 13. Par ailleurs, les ouvrages produits par des éditeurs locaux représentent un faible pourcentage dans l'offre de ces librairies qui font d'ailleurs peu d'animation autour du livre.



5. Quels sont les obstacles éventuels au commerce et à la distribution transfrontaliers des livres?
  - Les taxes aux frontières car malgré le fait que la plupart des pays de la CEDEAO ont ratifié l'Accord de Florence, il est peu appliqué dans les faits. Mais ces obstacles sont loin d'être insurmontables.
 À votre avis, que pouvez-vous faire pour améliorer la situation?
6. Combien y a-t-il d'éditeurs recensés? 13 nationaux; 1 internationaux; 1 ONG.
  - a. Combien publient régulièrement? 8 nationaux; 1 internationaux; 1 ONG.
7. Nombre de titres publiés en \_\_\_\_ 2017; \_\_\_\_ 2016; \_\_\_\_ 2015.
  - Nombre (ou pourcentage) des titres ci-dessus qui sont publiés en langues nationales pour les années \_\_\_\_ 2017; \_\_\_\_ 2016; \_\_\_\_ 2015.
  - Nombre (ou pourcentage) des titres ci-dessus qui sont publiés en anglais \_\_\_\_; français \_\_\_\_; langue officielle \_\_\_\_; langue nationale \_\_\_\_ pour les années \_\_\_\_ 2017; \_\_\_\_ 2016; \_\_\_\_ 2015.
8. Combien d'éditeurs scolaires existe-t-il? : 1 (Graines de Pensées)
  - Nombre de manuels scolaires publiés en 2017 \_\_\_\_; 2016 \_\_\_\_; 2015 \_\_\_\_.
  - 2016 : 4 titres : 900 000 exemplaires au total
  - 2017 : 4 titres : 900 000 exemplaires au total
  - Nombre de manuels scolaires publiés électroniquement (e-books) en 2017 \_\_\_\_; 2016 \_\_\_\_; 2015 \_\_\_\_.
  - Aucun
9. Combien d'éditeurs produisent des matériels complémentaires de lecture? : 6
  - Nombre de titres de matériels complémentaires de lecture publiés pour 2017 \_\_\_\_; 2016 \_\_\_\_; 2015 \_\_\_\_.
  - Nombre de titres de matériels complémentaires de lecture publiés électroniquement pour 2020 \_\_\_\_; 2016 \_\_\_\_; 2015 \_\_\_\_.
  - Pourcentage de matériels complémentaires de lecture destinés aux petites classes, de la naissance à la 3ème année du primaire?
10. Quelles sont les 3 principales barrières à la production de matériels destinés à la petite enfance?
  - Peu d'auteurs formés à la conception et à la rédaction d'ouvrages pour le pré-scolaire mais la donne est en train de changer. Plusieurs titres sont en cours de production.
11. Est-ce que le Ministère de l'éducation achète des manuels pour les écoles? \_\_\_\_ Oui; \_\_\_\_ Non.
  - a. Si oui, à quelle fréquence? \_\_\_\_ Annuel; \_\_\_\_ Occasionnel; \_\_\_\_ Jamais.
  - Des rédacteurs du ministère des Enseignements Primaire, Secondaire et de la Formation professionnelle conçoivent depuis 2015 de nouveaux manuels selon l'Approche par les compétences; un appel d'offres de la Banque Mondiale est alors lancé pour la conception éditoriale et le pré-presse, puis pour l'impression de ces ouvrages qui sont ensuite distribués gratuitement aux élèves du primaire sur toute l'étendue du territoire. Ainsi 4 titres ont été produits en 2016, 4 autres en 2017 et 12 sont en préparation pour 2018.
12. Est-ce que le Ministère de l'éducation achète des matériels complémentaires de lecture?
  - Si oui, à quelle fréquence? \_\_\_\_ Annuel; \_\_\_\_ Occasionnel; \_\_\_\_ Jamais.
13. Existe-t-il des publications destinées aux personnes vivant avec un handicap? Combien sont disponibles actuellement?
14. Quelles sont les 3 principales barrières à la production suffisante de ce type de matériels?
15. Ajoutez toute autre information pertinente.

Pays: TOGO

Complété par (nom/titre): Yasmin Issaka-Coubageat

Date: 02/08/18

**MERCI**

### PROFILE OF THE BOOK PUBLISHING INDUSTRY

1. What are the 5 major issues facing the publishing industry in your country? List them order of importance/seriousness, with 1 being the highest and 5 being the lowest.
  - i) A small market for books outside of formal education
  - ii) Fewer bookshops and other outlets which are still limited to big population urban centres
  - iii) Fewer professionals with the core publishing, editorial, writing, printing and bookselling skills
  - iv) Rampant book piracy and illegal reproductions
  - v) Unfavourable tax policy for example on printing inputs.
2. What are the 3 top capacity building needs for which you require assistance to address?
  - i) Publishing skills for new publishers
  - ii) Local language authorship skills
  - iii) Digital publishing and book distribution.
3. Provide a brief statement of the country context in which the publishing industry operates, including economic (including general outlook and taxes); education (children in basic education—up to end of secondary school, literacy level, policies); and library network (state number and how well they are operating—budget for purchases and patronage). Limit the statement to 300 words maximum.

Uganda currently has a population of 41.49 million (2016), with per capita income standing at US\$ 1,829 (2016). Youth literacy rate for 15-24 year olds stands at 87% (2015), while adult literacy rate (25 years and above) stand at 73.86%. Net enrolment in primary schools is 91% translating to 8.4 million children with a student transition rate to secondary schools of 58%. The book industry is growing in importance with government having increased investment in education. For example, following the introduction of mother tongue as language of instruction, the number of local languages in which publishing happens has now grown to 20 languages. Whereas the education book market has considerably grown, publishing activities targeting the open book market are very minimal. It should also be noted that the tax policy as of 2018 does provide VAT exemptions for educational books. The policy goes further to provide further exemptions to educational materials that are locally produced meaning that local printers can apply for exemptions for inputs needed to produce such materials.

The public library system in Uganda still stands at 32 public libraries whereas the actual need is for 122 to cover all districts. The libraries budget allocations do not favour book purchases and so the libraries function on donated materials especially from the UK. There is a growing trend of privately sponsored community libraries that are trying to bridge the access gaps. These stand at slightly over 100 community libraries, mainly rural and do target disadvantaged rural school children to enable them access much needed books.

4. Briefly describe the bookselling sector, commenting on infrastructure (number of bookshops, distribution outlets), and feasibility and use of electronic platforms, if applicable. Include information such as book promotional activities (adverts, reading tents, VIP/celebrity promos), literary awards, and book fairs.

Book distribution continues to be a challenge for the publishing industry in Uganda. By 2008, the number of bookshops across Uganda stood at 360. There has not been a new count, however it is expected that these numbers declined following the scrapping of the decentralized instruction materials procurement policy that more less powered bookshops development beginning in 2000. This coupled with the unwillingness of publishers to provide booksellers with book distribution contracts to the lucrative government procurement programmes has affected new investments in the sector. However, there is been a growing trend of establishing outlets in non-traditional book distribution channels including in supermarket chains, petrol station shops and such places across the country as alternatives for distribution. Book promotion activities have currently exploited social media to announce new titles, carry reviews of books and in some cases to do the actual distribution of pdf files. The big publishers continue to make use of traditional methods such as newspaper serialization, media book reviews and adverts. There is also growth in reading clubs and performance poetry groups across the major towns which provide new avenues for book launches and sales. Recently, a partnership of FEMRITE, Uganda Museum and other

partners has introduced the Uganda Book Market which takes place every end of month. The book market is intended to promote the selling and buying of African publications. The National Book Trust of Uganda and the National Library of Uganda spearhead National Book Week Festivals countrywide which promote reading and the book industry. In addition, there are several school based book week festivals that individual schools are currently organizing involving parents, booksellers and publishers. There are also book awards including the NABOTU Literary Awards, the Babishai Poetry Prize, the Writivism Festival Awards etc.

5. What are the impediments, if any, for cross-border book trade/distribution? What, in your opinion, can be done to improve the situation?

There is a lot of cross border book trade especially between Kenya, Uganda, Rwanda and South Sudan. The key impediment however appears to be political. For example some governments are moving towards local preference in regards to government contracts for textbook supplies. This tendency has pushed out several publishers from some markets in the region. Other impediments have to do with differences in curriculum, and language. To resolve some the issues cited, it might be important at a political level to move towards a common curriculum and policy that encourages cross border book trade. In addition, it is important for cooperation especially in enforcing the copyright laws against book piracy in the East African region.

6. How many registered publishers are there? -60—national; --3-multinational; ---NGO.
7. How many are actively publishing? -10—national; --6-multinational; ---NGO. (Some multinationals just come in to compete for a tender and move away)
8. State number of titles produced in print for ---2017 ---2016 ---2015.
  - State number (or percentage) of above titles produced in local languages for ---2017 ---2016 ---2015.
  - State number (or percentage) of above titles produced in English ---; French ---; official/national language (state) for ---2017 ---2016 ---2015.
9. How many publishers produce textbooks?
  - State number of textbook titles published in print for ---2017 ---2016 ---2015.
  - State number of textbook titles published electronically (e-books) for ---2017 ---2016 ---2015.
10. How many publishers produce supplementary readers?
  - State number of supplementary reading titles published in print for ---2017 ---2016 ---2015.
  - State number of supplementary reading titles published electronically (e-books) for ---2017 ---2016 --2015.

(There are no statistics of these materials at the moment. What is known though is that for every government tender for school textbooks, a number of publishers do participate and only four get shortlisted as recommended texts.)

- What percentage of supplementary readers are targeted to early grades, that is, from Birth to Grade (Primary Class) 3?
- What are the 3 main barriers to producing early grade materials?
  - i. In most cases no budget is expended towards these materials by government. The main source of materials in the last two years has been the USAID funded School Health and Reading Program which was implemented without the participation of local book publishers.
  - ii. There are some quality issues especially for local language materials with some language communities rejecting certain titles. This speaks to the issue of writing and editorial skills that are lacking in many of the languages.
  - iii. Only a few of the local languages have standardized orthographies.
- 11. Does the Ministry of Education purchase textbooks for schools? -X--Yes ---No.
  - If yes, how often? ---Yearly -X--Occasionally ---Never.

12. Does the Ministry of Education purchase supplementary readers for schools?
- If yes, how often? ---Every year -X--Occasionally ---Never.
13. Are publications produced specifically for persons with disabilities? How many are currently available? Who produces them?
- a) Materials for persons with disabilities are produced by the Uganda National Institute for Special Education which is currently under Kyambogo University. Check Education Abstract 2015 for statistics
- What are the 3 main barriers preventing sufficient publication of these materials?
- a) Limited budget
- b) Need for other gadgets such as computers that would enable learners access other formats other than Braille
- c) The copyright law provides for only one format (Braille).
14. Add any other relevant information.

Country: Uganda

Completed by (name/designation): Charles Batambuze, Executive Director, National Book Trust of Uganda (NABOTU)

Date: 18<sup>th</sup> August, 2018

**THANK YOU**

## PROFILE OF THE BOOK PUBLISHING INDUSTRY

1. What are the 5 major issues facing the publishing industry in your country? List them order of importance/seriousness, with 1 being the highest and 5 being the lowest.
  - ❖ Unfavorable tax regime especially on books printed abroad
  - ❖ Constrained market due to lack of developed bookselling industry
  - ❖ Poor reading culture of the larger population
2. What are the 3 top capacity building needs for which you require assistance to address?
  - ❖ E-publishing
  - ❖ Personnel involved in publishing process such as authors, Editors etc. need up scaling
  - ❖ General administration/management of publishing company
3. Provide a brief statement of the **country context in which the publishing industry operates**, including **economic** (including **general outlook** and **taxes**); education (children in basic education—up to end of secondary school, literacy level, policies); and library network (state number and how well they are operating—budget for purchases and patronage). Limit the statement to 300 words maximum.
  - ❖ Currently there are 12 Publishing companies (both indigenous & foreign) registered with the Book Publishers Association of Zambia
  - ❖ Most of these solely depend on the Ministry of General Education to buy their published textbooks
  - ❖ There is very little locally produced general (supplementary) reading materials for all levels
  - ❖ Though taxes on books produced locally are relatively low, cost of paper and other inputs into publishing are very high
  - ❖ There are very few public libraries operated by the Zambia Library Services in some municipalities, however they usually have limited books and sometimes manned by unqualified Librarians.
4. Briefly describe the bookselling sector, commenting on infrastructure (number of bookshops, distribution outlets), and feasibility and use of electronic platforms, if applicable. Include information such as book promotional activities (adverts, reading tents, VIP/celebrity promos), literary awards, and book fairs.
  - ❖ Electronic platforms constrained by limited power availability especially in the country side
  - ❖ Except for ZEPH bookshops in all ten provincial towns, most private bookshops confined to about 6 urban towns.
  - ❖ The publishers association conducts annual book fairs
5. What are the **impediments, if any, for cross-border book trade/distribution**? What, in your opinion, can be done to improve the situation?
  - ❖ Varying curricular since Publishing is skewed towards textbook publishing
  - ❖ Venturing into African languages supplementary readers' publishing since there are cross boarder languages
6. How many registered publishers are there? **Twelve (12) national Four (04) multinational Eight (08) NGO.**
7. How many are actively publishing? **Four (04) national Eight (08) multinational Nil NGO.**
8. State number of titles produced in print for **approximately forty six (46) 2017 approximately sixty two (62) 2016 approximately sixty two (62) 2015.**
  - State number (or percentage) of above titles produced in local languages  
for **thirty percent 30% 2017 twenty six percent 26% 2016 twenty six percent 26% 2015.**
  - State number (or percentage) of above titles produced in English **about seventy three percent 73% French Nil; official/national language (state) for seventy percent 70% 2017 seventy four percent 74% 2016 seventy four percent 74% 2015.**
9. How many publishers produce textbooks?
  - State number of textbook titles published in print for **twelve publishers (12)2017 twelve publishers (12)2016 ten publishers (10) 2015.**
  - State number of textbook titles published electronically (e-books) for ---2017 **Nil 2016 Nil 2015.**
10. How many publishers produce supplementary readers?
  - State number of supplementary reading titles published in print for **Nil 2017 Nil 2016 Nil 2015.**
  - State number of supplementary reading titles published electronically (e-books)

for **Nil 2017 Nil 2016 Nil 2015.**

- What percentage of supplementary readers are targeted to early grades, that is, from Birth to Grade (Primary Class) 3? **Less than one percent (<1%)**
- What are the 3 main barriers to producing early grade materials? **Low enrolment at ECE level, But no barrier at grades 1-3 for all subjects except for Literacy and language reserved for the Publisher where government has interests**
- 11. Does the Ministry of Education purchase textbooks for schools? ✓ Yes ---No.
- If yes, how often? ✓ Yearly ---Occasionally ---Never.
- 12. Does the Ministry of Education purchase supplementary readers for schools? ✓ Yes ---No
- If yes, how often? ---Every year ✓ Occasionally ---Never.
- 13. Are publications produced specifically for persons with disabilities? ✓ Yes ---No How many are currently available? **About forty (40) titles.** Who produces them? **Zambia Educational Publishing House, With Government Support**
- What are the 3 main barriers preventing sufficient publication of these materials? **Cost due to low print runs, Inadequate trained authors**
- 14. Add any other relevant information.

Country: **Zambia**

Completed by: **Lazarous Mutale / Outgoing Publishing Manager - ZEPH**

Date: **June 14, 2018**

## Annex 4.12 - **ZAMBIA #2**

### **PROFILE OF THE BOOK PUBLISHING INDUSTRY**

1. What are the 5 major issues facing the publishing industry in your country? List them order of importance/seriousness, with 1 being the highest and 5 being the lowest.
  1. Few contracts
  2. Capital to do the work
  3. Rentals
  4. Finding market
  5. Finding quality authors
2. What are the 3 top capacity building needs for which you require assistance to address?
  1. Training in adapting books for the visually impaired
  2. Training in using specialized braille equipment
  4. Training in using software for developing books
3. Provide a brief statement of the country context in which the publishing industry operates, including economic (including general outlook and taxes); education (children in basic education—up to end of secondary school, literacy level, policies); and library network (state number and how well they are operating—budget for purchases and patronage). Limit the statement to 300 words maximum.
4. Briefly describe the bookselling sector, commenting on infrastructure (number of bookshops, distribution outlets), and feasibility and use of electronic platforms, if applicable. Include information such as book promotional activities (adverts, reading tents, VIP/celebrity promos), literary awards, and book fairs.
5. What are the impediments, if any, for cross-border book trade/distribution? What, in your opinion, can be done to improve the situation? Language, market doesn't favour foreigners
6. How many registered publishers are there? ---national ---multinational ---NGO.
7. How many are actively publishing? ---national ---multinational ---NGO.
8. State number of titles **adapted into braille** ---2017 (99) ---2018 (98)
  - State number (or percentage) of above titles produced in local languages
  - 2017 (99) ---2018 (98) State number (or percentage) of above titles produced in English ---; French - -- ; official/national language (state) for ---2017 (90) ---2018 (90)
9. How many publishers produce textbooks?
  - State number of textbook titles published in print for ---2017 ---2016 ---2015.
  - State number of textbook titles published electronically (e-books) for ---2017 ---2016 ---2015.
10. How many publishers produce supplementary readers?
  - State number of supplementary reading titles published in print for ---2017 ---2016 ---2015.
  - State number of supplementary reading titles published electronically (e-books)

for ---2017 ---2016 ---2015.

- What percentage of supplementary readers are targeted to early grades, that is, from Birth to Grade (Primary Class) 3?
  - What are the 3 main barriers to producing early grade materials?
11. Does the Ministry of Education purchase textbooks for schools? ---Yes
- If yes, how often? ---Yearly
12. Does the Ministry of Education purchase supplementary readers for schools?
- If yes, how often? ---Occasionally
13. Are publications produced specifically for persons with disabilities? How many are currently available? Who produces them? learners with Intellectual 2017 (99) ---2018 (98) 1. The Zambia Library and Skills Training Centre for the Blind and Visually Impaired – makes braille books. Pebble Signs Advertising makes sign language materials. Zambia Educational Publishing House develops books for Disabilities
- What are the 3 main barriers preventing sufficient publication of these materials? 1. Attitude 2. Inadequate knowledge about this area. 3. Insufficient publishers
14. Add any other relevant information.

Country: Zambia

Completed by (name/designation): Donald Nongola, Senior Curriculum Specialist (Special Education)

Date: 19<sup>th</sup> July, 2018

## ANNEX 5: CONSIDERATIONS TO GUIDE LAUNCH OF A PUBLISHING COLLABORATIVE

The Global Book Alliance (GBA) is working to transform book development, procurement, and distribution to ensure that no child is without books. To this end, the GBA seeks to improve the book chain from the ground up, rebuilding and reinforcing links across the board. Through its flagship initiative, the Publishing Collaboratives (PC), the GBA will support publishers in low-resource settings to identify and create high-quality titles, building local publishing markets.

*“Publishing Collaboratives will support local publishers as the cornerstone for local book development, creating the culturally appropriate titles that will populate classrooms.”*

Following are **suggestions to guide launching a PC**.

1. Existence of an organized book publishing industry – must have functioning book chain.
2. Landscape analysis of the publishing industry – state/level of development, publishing environment, and needs.
3. Support from the Ministry of Education (MoE). They control the schools market and regulate what titles can be distributed. Is there a national book policy? Are there book standards for the industry? Is there data available about books?
4. Willingness among stakeholders to collaborate. This may include financial and other contributions.
5. Identified key individuals who can facilitate communication within the book publishing industry, MoE, and GBA.
6. Local language title development is a national priority.
7. Budget for book purchases by the government. Is the annual budget for book purchase sufficient?
8. Atmosphere around digital publishing. This includes issues relating to open educational resources (open access).
9. Appetite for regional collaboration, particularly where there is high probability for cross-border language publishing.
10. Funding required from GBA in short- and/or long-term.



## ANNEX 6: CONCEPT NOTE FOR A MINI-INITIATIVE TO TEST BEST PRACTICE

### **Books for All Children – Strengthening the Book Supply Chain in Africa** *Developing mini-initiatives for a Publishing Collaborative*

#### CONCEPT NOTE

Prepared by Richard Crabbe & David Waweru

---

#### **Background**

Advances in enrollment have occurred over the past 15 years, yet 250 million children of primary school age are unable to recognize basic letters and numbers.<sup>78</sup> Worryingly, 130 million of these children attend four years or more of school and still leave without basic foundational skills.<sup>79</sup> The learning crisis is thus acute, and it constrains the potential and growth of children around the world.<sup>80</sup> Children must learn to read so that they can read to learn throughout their education. Reading books are particularly important in building the foundational skill of literacy and in developing children's background knowledge in key content areas.<sup>81</sup> Despite decades of government and development partner funding, few schools or communities have an adequate supply of early grade reading materials.

The Global Book Alliance (GBA), an international partnership of bilateral, multilateral, and non-governmental organizations dedicated to ensuring that children everywhere have access to high-quality books with which they can learn to read, read to learn, and develop a lifelong love of reading, is working to address challenges across the book chain, to transform title development, publication, procurement, distribution, and use of books supporting early grade reading at a global level.

One of the initial activities that the Alliance is undertaking with regard to title development and publication is the development of publishing collaboratives (PC), that will engage with the publishing sector in low-resourced regions in productive conversations about ways to create high-quality titles, improve professional skills, and strengthen local book publishing markets so as to increase access to high quality low cost reading materials in national languages. As envisaged, “publishing collaboratives will support local publishers as the cornerstone for local book development, creating the culturally appropriate titles that will populate classrooms.”<sup>82</sup>

In January 2018, stakeholders in the African publishing industry, at a workshop jointly organized by the USAID, under the auspices of the Working Group on Books and Learning Materials (WGBLM) of the Association for the Development of Education in Africa (ADEA), and the GBA unanimously adopted the African Publishing Collaborative. This is an action plan around five pillars for advocating and establishing innovative and effective mechanisms within countries for the production, acquisition, distribution, management and use of textbooks and other reading materials in national languages. Aligned with the GBA's ethos, Objective 2 of Pillar 4, Publishing Partnerships, aims to “ensure a stronger, versatile, economically sustainable industry by increasing availability and access of high quality books and learning materials development in Africa and encouraging the creation of conducive conditions that facilitate the active exchange of skills and knowledge in the selling and buying of rights, co-publishing and co-editions across borders.”

The PC would therefore be a mechanism to involve industry players, governments, and funders in supporting the development of sustainable local publishing industries. Active engagement of the publishing industry is essential to ensure long-term success of the Collaborative.

## Objectives

The objectives of the pilot are:

1. **Proof of concept:** Pilot the concept of national language title development, production, and supply of lower grade readers in selected countries to gain real world assessment of the technical and financial viability the concept.
2. **Testing impact and delivery:** Test the concept for social impact, improved outcomes and/or market viability, as well as operational refinement to build paths to sustainability and scale.
3. **Scaling-up:** Test potential for adaptation of a rigorously evaluated innovation to new contexts, geographical areas.

## Piloting the PC Concept

In pursuance of these objectives, a number of pilots will be carried out to test ideas from stakeholders for organizing and operationalizing the PC concept. These include:

1. Who should participate in a PC?
2. How can GBA incentivize publishers to participate in the PC?
3. What should be the scope of a PC's activities?

SUGGESTED PILOT PLAN (DURATION OF 9-12+ MONTHS) – MAY BE ADAPTED FOR ONE COUNTRY					
	ACTIVITIES	TIMELINES	BENEFICIARIES	IMPACTS	BUDGET
Pilot countries	1. Selection criteria developed 2. Pilot countries identified		1. National governments 2. Local publishing industry	Insights about in-country systems shapes design of program	
Compose coordinating teams in select countries	1. Identify country champions 2. Appoint local teams 3. Briefing		Publishing industry	Insights as to what kind of structures will be efficient, effective	
Workshops for country coordinating teams	1. Develop curriculum for training on title development 2. Develop curriculum for training on delivery and tracking 3. Deliver training		1. Publishing industry 2. Pilot participants	Increased chance of quality feedback	

Pilot schools	Coordinating teams and MOEs select pilot schools	1. MOEs 2. Pilot schools	More books available
Title selection, production and procurement	1. GBA Call for titles 2. Selection and contract award* 3. Production 4. Procurement	MOEs Publishing industry	Higher purchases leads to lower costs, strengthens local industry
Schools supplied with titles	1. Distribution 2. Track N Trace system deployed	1. Publishing industry 2. Schools 3. MOEs	Intervention strengthens/improves existing country system
Monitoring and evaluation	TBD	1. Publishing industry 2. MOE 3. GBA	Improved decision-making
Country reports	1. Coordinating teams compile reports 2. Pilot assessment	1. GBA 2. MOEs 3. Publishing industry	
Project report	1. Project Consultant compiles overall report 2. TAG input 3. Final reports filed with GBA/USAID	1. GBA 2. Publishing industry	Convince stakeholders of feasibility of project and the PCs

\* Include here a workshop around the selection, whereby it's transparent and it serves as a learning opportunity for publishers, government, and other stakeholders about what makes a great children's book. It will also be an opportunity to agree on standards together and practice applying them fairly.

## Next Steps

- Discuss with ADEA WGBLM the modalities for developing and promoting the PCs, implementing the pilot, and organizing forums for policy dialogues between MOEs and the publishing industry.
- Discuss with the Technical Advisory Group on Publishing Collaboratives.
- Launch initiative and invite proposals from interested countries. Proposals would include identified needs and suggestions for GBA intervention, including capacity building and policy dialogue.
- Select one country each from East Africa; West Africa (Anglophone); West Africa (Francophone); and Southern Africa. Countries may be selected to reflect different levels of publishing industry development, policy environment, languages in publications, and distribution channels.
- Industry representatives organize the publishing collaborative, discuss and adopt intervention strategy, to include capacity building as required.

- Roll out intervention strategy.
- Procure books: Could be limited purchase of newly-developed or existing books to supply parts of the country with different infrastructure and needs (roads, communication, etc.). May include electronic options and material for the sight impaired.
- Document process: from launch to delivery and use; lessons learned; recommendations for improvement and scale-up.
- Share findings at select international fora such as international book fairs (for example, Nigeria-May; Ghana-August; Nairobi-September; Dakar-November).

**Budget:** TBD

### **Project Management**

Modalities: TBD.

## ANNEX 7: READING CODE

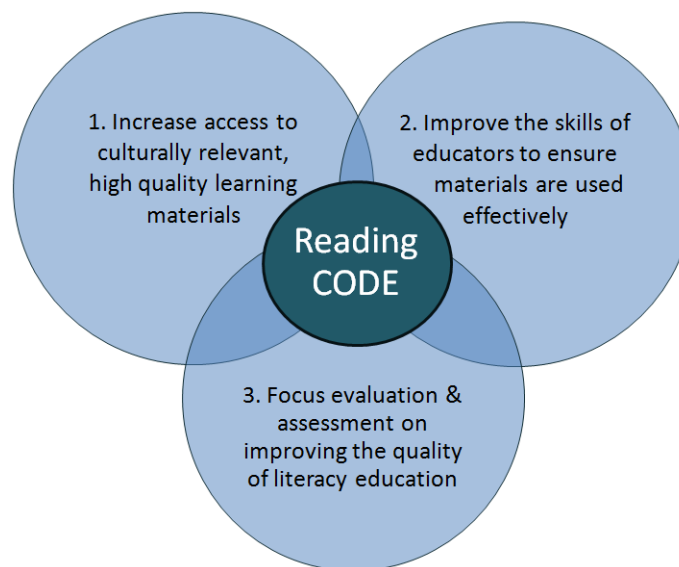
### The Reading CODE Concept

*Reading CODE* is the comprehensive readership initiative at the heart of CODE's international literacy programming, currently being implemented in eight African countries: Ethiopia, Ghana, Kenya, Liberia, Mali, Mozambique, Sierra Leone, and Tanzania. Through Reading CODE (and its national iterations such as Reading Ethiopia, Reading Ghana, etc), CODE works with local teachers, librarians, writers, and publishers to support and sustain the development of literacy learning in K-12 schools.

The goal of *Reading CODE* is to engage readers with culturally relevant books they can read for pleasure and understanding, books they can interpret, relate to, and use to inform and enrich their schooling and their lives. The intent is to create skilled readers and thoughtful, engaged citizens.

#### READING CODE

##### Comprehensive Reading Approach



To make sure literacy initiatives take root and yield results over the long term, *Reading CODE* combines three elements:

1. **Sustained access to interesting books, relevant to the readers, and written in languages the readers understand**
2. **Meaningful engagement with these books through high quality teaching**
3. **Focused evaluation and assessment and effective partnerships that build the capacity of local partners**

Source: <https://code.ngo/reading-code>

## Where do relevant, high quality reading materials come from and how is the supply sustained?

Developing a nation of readers requires a diversity of rich reading and learning materials that are respectful of the cultural integrity of a country and crafted to supplement and expand topics addressed by the national curriculum. The production of such materials, be they made available digitally or in traditional print, requires localized knowledge and professional expertise in the form of skilled writers, illustrators, editors and others whose efforts need to be effectively linked one to the other in a sequence often referred to as the ‘book chain’. The ability to operationalize and sustain this book chain is in effect the process of publishing, an activity that is inherently entrepreneurial and best pursued by the private sector. The publisher is the architect of the book, responsible for a process that starts with research and financing and ends with selling the finished product so the cycle can begin anew.

Developing local book publishing capacity depends primarily on the existence of a viable market, but if neither market nor capacity presently exists it’s extremely short-sighted for well-meaning donors to simply usurp the role of the publisher or attempt to address demand through imported content. *Reading CODE’s* approach in such cases is to establish a mechanism to activate a book trade by subsidizing demand while supporting the development of skills at every link in the book chain: writers, illustrators, designers, editors... and publishers!

Features of *Reading CODE’s* approach to publishing:

- Support to indigenous publishing is critical for support to indigenous culture and language
- Diversity of publishers needed for the diversity of materials required for a literate environment
- Subsidizing production hurts competition whereas subsidizing market demand strengthens competition
- Quality is motivated by competition
- Economies of scale supported through the buying, selling and trading of rights at the regional level
- Skill development training for all aspects of the book chain
- Publishers need access to the more profitable textbook market if they are to publish the higher risk supplementary materials required to cultivate the lifetime reading habit
- Strong libraries means ready access to materials for readers, and markets for publishers

Proprietorship of the books, including copyright, protects the publishers’ possibility to make a profit and stay in business, which in turn helps guarantee the very right of freedom of expression. If African countries are going to become literate societies, ones that can express themselves and their own culture, they need viable publishers and authors who can address the needs of the marketplace and make a living without being dependent on patronage, corporate sponsors or third parties. Policies are needed that support local publishers, not undermine them.



Save the Children

# GROWING THE LOCAL BOOK INDUSTRY

## The experience of a publishing collaborative in Rwanda

In Rwanda, Save the Children collaborated with education ministries, publishing industry stakeholders, schools, book sellers and libraries in order to strengthen existing systems and increase output and availability of quality local language children's books. This **'whole chain' approach** addresses every step of a book's journey from authorship to child and emphasizes the need for **sustainable, profitable industries** which will **guarantee availability** of local-language, contextually relevant reading materials to support a culture of reading in the long term.

### REPLICATING THE APPROACH

- 1 **Conduct a local book audit.** Collect titles or information from book sellers and publishers to understand the existing capacities of the industry and market demands. The ease with which one can determine what is available tests the book chain.
- 2 **Offer trainings and ongoing mentoring to the publishing industry** and its constituent parts: authors, illustrators, editors, designers and publishers. Initially trainings focus on general children's book development. Over time, trainings focus on more specific skills.
- 3 **Support the establishment of communities of practice for each constituent part of the industry.** For example, writer's cafés, local publishers' associations, etc.
- 4 **Develop and share quality guidance** to evaluate the age and cultural appropriateness of story drafts as well as the quality of writing and illustration and the physical production standards. When necessary, create guidelines that are relevant to different categories: picture books, levelled readers, concept books, early chapter books, etc.
- 5 **Establish a book review committee** to review new story drafts and provide feedback to publishers on how to improve the books before going to print. The committee also identifies and endorses books that meet minimum quality standards.
- 6 **Make advance purchase commitments to support local publishers** to produce new titles in the knowledge that their titles will be purchased when they are brought to market. Require publishers to print a larger quantity than the advance market commitment to stimulate the supply chain
- 7 **Develop partnerships with other child-focused development actors to co-procure titles,** thereby increasing the quantity of the orders and decreasing the unit prices of new titles.
- 8 **Support publishers to identify distribution points and enhance their marketing capacities.** Begin exploring support to book sellers, if appropriate.
- 9 **Gradually phase out financial and technical support to publishers** as they transition to more independent businesses comprising a functional professional collaborative.
- 10 **Encourage publishers to set up a national professional consortium,** ideally drawing on organisations representing its constituent parts, that serves as an advocacy platform to continuously promote the growth of the industry and align the collective's goals to national, continental and global book sector strategic objectives.

# ONGOING CONSIDERATIONS

## ✓ Engage in advocacy.

Some key priorities to advocate for:

- Validation of a National Book Policy
- Allocation of funds for book buying within government education budgets
- Strengthening of the public library network
- Increased support for the local publishing sector through government incentives such as tax exemption on paper; entrepreneurship programs and country representation in continental and global book events, etc.

## ✓ Make continuous effort to stimulate demand for the newly developed books.

Effective strategies include supporting book campaigns, book fairs, linking publishers with retailers, urging for other organizations to procure books and engaging the media to publicize books.

## ✓ Invest in research to strengthen the evidence base for the approach.

Studies could investigate children's readership preferences or the impact of the local publishing industry on job growth, for example youth employment.

## ✓ Support publishers to expand their networks.

Encourage them to buy rights to contextually appropriate stories for translation as well as seek to sell rights internationally.

## ✓ Provide technical input on book use.

- Incorporate guidance on effective book use within teacher training programs to ensure schools have the support and skills necessary to use and manage books.
- Involve the local education board in capacity-building initiatives to positively influence its process for approving storybooks for classroom use.
- Develop guidance to support parents to use books at home with their children and ensure that children have access to books outside of school.

## ✓ Become the trusted partner and thought leader in children's book development.

Provide ongoing technical support to book sector actors, Government of Rwanda and development partners.



**Save the Children**



## ANNEX 9: Publishing Collaboratives in Africa

The following issues were discussed at a session organized by ADEA and held during the 16<sup>th</sup> Ghana International Book Fair in September 2018.

ISSUE	RECOMMENDATION
<b>How will the PCs be organized?</b>	<ol style="list-style-type: none"><li>1. Multisectoral network, comprising of representatives of following key actors:<ol style="list-style-type: none"><li>a. Writers, publishers, booksellers, printers, librarians and readers</li><li>b. Government agency like the institute of curriculum development</li><li>c. Reproduction Rights Organization</li><li>d. Critical players in education (NGOs)</li><li>e. Technology firm</li></ol></li><li>2. Create criteria for selecting participating stakeholders</li><li>3. Develop rules of engagement</li><li>4. Develop TORs</li><li>5. Create an operational plan</li><li>6. Appoint Country Champion</li></ol>
<b>What would be needed for the PCs to be successful?</b>	<ol style="list-style-type: none"><li>1. Shared ownership of a compelling vision, mission and objectives</li><li>2. Agreement on country-specific issues and priorities</li><li>3. Openness, transparency and trust among stakeholders</li><li>4. A code of conduct</li><li>5. Mechanism for resolving disputes</li><li>6. Ability to gather and analyze relevant industry data</li><li>7. Funding</li></ol>

### Note:

ADEA (B-LM) will soon disseminate the complete Report on the Forum on the revitalization of APNET under its partnership program with USAID/GBA. The report will provide details on the way forward regarding the implementation of the PC initiative in Africa with the cooperation of APNET members.

However, given the constraints of time and the necessity to predict any slow reaction from the current APNET Board, the ADEA Team has considered a Plan B. Under Plan B, a Special Purpose Task Force, comprising of prominent African professionals in the book chain – writers, publishers, booksellers, librarians and reading specialists – would work with the ADEA B-LM team to take care of the **African Publishing Collaborative (APC)** as a new way to achieve the target goals. This was actually envisioned as a “Coordinating Team” in the “Five Pillars” developed and adopted at the January 2018 ADEA/GBA African Publishing Industry Stakeholders Workshop.

## **ANNEX 10: CONFERENCES, MEETINGS, AND SEMINARS ON PUBLISHING AND BOOK DEVELOPMENT IN AFRICA, 1968 TO 2018<sup>83</sup>**

Below are details of some of the major conferences, meetings or seminars held in English-speaking Africa, or at venues outside Africa, since 1968. Several more such conferences have taken place for the francophone African book industries, but which are not listed here except for the bi-lingual 1981 UNESCO Dakar meeting.

- 1968      UNESCO Regional Meeting for Book Development, Accra, Ghana, February 1968.
- 1973      International Conference on Publishing and Book Development in Africa, University of Ife [now Obafemi Awolowo University], Ile-Ife, Nigeria, December 1973.
- 1981      UNESCO Meeting of Experts on National Book Strategies in Africa/Réunion regionale d'experts sur le strategies nationaux du livre en Afrique, Dakar, Senegal, February 1981.
- 1984      Seminar on the Development of Autonomous African Publishing Capacity, Dag Hammarskjöld Foundation, Arusha, Tanzania, April 1984 (two more seminars, Arusha II in 1996, and Arusha III, an 'African Writers-Publishers Seminar', followed in 1998.)
- 1991      Conference on Publishing in the Third World, The Rockefeller Foundation, Rockefeller Conference Centre, Bellagio, Italy, February 1991.
- 1992      Promoting Technical Publishing in Africa-Seminar. Technical Centre for Agricultural and Rural Cooperation of ACP-EU (CTA), Arnhem, Netherlands, November 1992.
- 1997      Access to Information 'Indaba', Zimbabwe International Book Fair Trust, August 1997 (on 'National Book Policy', 'Information Technology and Rights', 'Scholarship and Research', and 'Community Access to Information'.)
- 1997      Seminar on Understanding the Educational Book Industry, Human Development Network, The World Bank, Washington DC, September 1997. (On strengthening publishing capacity in Africa and in others parts of the developing world.)
- 1997      Conference on Academic Book Production and Distribution in Africa. Support from Nordic Countries, Chr. Michelsen Institute, Bergen, Norway, April 1997.
- 2001 –      African Publishing Initiative (API). World Bank, Office of the Publisher, Publishing for  
2007      Development in Africa Workshop, Washington DC, May 2001. Among other activities, and a wide-ranging work programme, the API, founded in 1997, also hosted further 'Publishing for Development' workshops at book fairs and other book promotional events in Africa between 1999 and 2007. Activities have now apparently ceased<sup>1</sup>.
- 2002      Books for Development-A Workshop to Bring Key Stakeholders in the Book Chain Together, Book Aid International, September 2002, Kampala, Uganda.
- 2007      Capacity Building in the African Publishing Industry, Nigerian Book Fair Trust, Lagos, Nigeria, May 2007.
- 2011      International Conference on Book Development in Africa, Association for the Development

of Education in Africa (ADEA), Working Group on Books and Learning Materials, Nairobi, Kenya, October 2011.

- 2016 Academic Book of the Future Project. The Academic Book in the South Conference. British Library, London, March 2016.
- 2017 High Level Regional Conference-The Publishing Industry in Africa and its Role in Education and Economic Growth, World Intellectual Property Organization (WIPO), Yaoundé, Cameroon, November 2017.
- 2018 Regional Workshop for African Book Industry Stakeholders, Association for the Development of Education in Africa (ADEA)/Global Book Alliance/ (GBA)/USAID, Abidjan, Côte d'Ivoire, January 2018.
- 2018 IPA Seminar Publishing for Sustainable Development-The Role of Publishers in Africa. International Publishers Association (IPA)/Nigerian Publishers Associations, Lagos, Nigeria, May 2018.

**Note:**

I See also at this permanent World Bank link about the API at <http://go.worldbank.org/MPLH6G3200>.

## ANNEX 11: LIST OF INTERVIEWEES (*Text coming*)

## ENDNOTES

---

- <sup>1</sup> [https://www.uneca.org/sites/default/files/PublicationFiles/demographic\\_profile\\_rev\\_april\\_25.pdf](https://www.uneca.org/sites/default/files/PublicationFiles/demographic_profile_rev_april_25.pdf)
- <sup>2</sup> “Government Should Stop War on Books,” by David Waweru, the Nation, July 14, 2018: <https://www.nation.co.ke/oped/opinion/Government-should-stop-war-on-books/440808-4661658-aeffhq/index.html>
- <sup>3</sup> The State of Digital Publishing: Facts and Figures from Ghana, Kenya, and Nigeria. Worldreader. Forthcoming September 2018.
- <sup>4</sup> Zell H. M., The African university press – A gloomy picture, 2017.
- <sup>5</sup> Feasibility Study for a Global Book Fund (2016), Research for Development; page 5.
- <sup>6</sup> Ibid., page 6.
- <sup>7</sup> <https://www.globalpartnership.org/event/textbook-and-educational-materials-community-practice-workshop-2012>.
- <sup>8</sup> Closing the children’s book gap: Global Book Alliance 2018 – 2020 Strategy; page 4.
- <sup>9</sup> Ibid., page 10.
- <sup>10</sup> UNESCO Institute for Statistics (UIS) Fact Sheet No. 46, September 2017; page 1
- <sup>11</sup> Ibid., page 2
- <sup>12</sup> World Development Report 2018: Learning To Realize Education's Promise. Washington, DC : World Bank, 2018.
- <sup>13</sup> Ibid., page 7
- <sup>14</sup> Nhan-O'Reilly, Joseph. Books are essential to solving the global learning crisis. World Education Blog. [Online] February 23, 2018. <https://gemreportunesco.wordpress.com/2018/02/23/books-are-essential-to-solving-the-global-learning-crisis/>. [accessed 2018 Jul 23].
- <sup>15</sup> UNICEF. Early Moments Matter for Every Child. [www.unicef.org](http://www.unicef.org). [Online] September 2017. [https://www.unicef.org/media/files/UNICEF\\_Early\\_Moments\\_Matter\\_for\\_Every\\_Child\\_report.pdf](https://www.unicef.org/media/files/UNICEF_Early_Moments_Matter_for_Every_Child_report.pdf); page 36
- <sup>16</sup> Manji, Sheila. Getting Early Grade Reading Right: A case for investing in quality early childhood education programs. Silver Spring, MD : University Research Co., LLC, 2018.
- <sup>17</sup> Ibid., page 12
- <sup>18</sup> Clifford, R. M., S. S. Reszka, and H. Rossbach. Reliability and validity of the Early Childhood Environment Rating Scale. Chapel Hill: University of North Carolina, FPG Child Development Institute; 2010.
- <sup>19</sup> Stranger-Johannessen, Espen: Africa Language and Literacy. A Landscape Review of Language and Literacy Research in African Contexts. Ottawa: CODE (Guiding Literacy Practice: Context Matters), 2017.
- <sup>20</sup> Anderson. R. C., E. H. Hiebert, J. A. Scott, and I. A. G. Wilkinson. Becoming a nation of readers: The report of the commission on reading. 1985.
- <sup>21</sup> Manji, 2018.
- <sup>22</sup> Feasibility Study for a Global Book Fund (2016), Research for Development; page 5
- <sup>23</sup> Ibid., page 6
- <sup>24</sup> [www.globalbookalliance.org](http://www.globalbookalliance.org)
- <sup>25</sup> GBA Strategy 2018-2020; page 3
- <sup>26</sup> Ibid., page 10
- <sup>27</sup> Ibid.,
- <sup>28</sup> [www.globalbookalliance.org](http://www.globalbookalliance.org) (Accessed on June 1, 2018)
- <sup>29</sup> GBA Strategy, page 17
- <sup>30</sup> Details can be found in Annex 3
- <sup>31</sup> Zell, Hans M., Raphaël Thierry. Book Donation Programmes for Africa: Time for a Reappraisal? Two Perspectives. 2015. African Research & Documentation no. 127.

- 
- <sup>32</sup> Ball, Jessica. Children Learn Better in Their Mother Tongue: Advancing research on mother tongue-based multilingual education. *Global Partnership for Education*. [Online] February 21, 2014. <https://www.globalpartnership.org/blog/children-learn-better-their-mother-tongue>.
- <sup>33</sup> IPA Regional Seminar in Nigeria. *International Publishers Association*. [Online] June 5, 2018. [https://www.internationalpublishers.org/images/events/IPA\\_Seminars/Lagos\\_May\\_2018/FINAL-IPA-REPORT.pdf](https://www.internationalpublishers.org/images/events/IPA_Seminars/Lagos_May_2018/FINAL-IPA-REPORT.pdf).
- <sup>34</sup> Ghana iREAD Study II (2012-2014): <https://www.worldreader.org/learnings/literacy/> [accessed on 2018 Aug 8].
- <sup>35</sup> Association for the Development of Education in Africa (ADEA). A Comparative Study on the Role of Digital Media and Print Media in Enhancing Literacy and Reading Culture in Africa. Abidjan: ADEA Working Group on Books and Learning Materials, 2016, page 4.
- <sup>36</sup> UNESCO. Book Development in Africa: Problems and Perspectives. Paris: UNESCO, 1969.
- <sup>37</sup> Zell and Thierry, 2015, page 14
- <sup>38</sup> “Government Should Stop War on Books,” by David Waweru, the Nation, July 14, 2018: <https://www.nation.co.ke/oped/opinion/Government-should-stop-war-on-books/440808-4661658-aefhmq/index.html>
- <sup>39</sup> Mullis, I. V. S., M. O. Martin, P. Foy, and K. T. Drucker. PIRLS 2011 International Results in Reading. International. Boston: TIMSS and PIRLS International Study Center, 2012.
- <sup>40</sup> Save the Children International. Lessons in Literacy: 8 principles to ensure every last child can read. London: Save the Children International, 2016.
- <sup>41</sup> Duursma, E., M. Augustyn, and B. Zuckerman. Reading aloud to children: The evidence. *Archives of Diseases of Childhood* 93, no. 7 (2008): 554–57.
- <sup>42</sup> Zell, Hans M. African book industry data, and the state of African national bibliographies (Draft version). July 2018.
- <sup>43</sup> IPA Regional Seminar, 2018.
- <sup>44</sup> <http://rwandatoday.africa/news/publishers-face-closure-as-govt-starts-printing-school-material/4383214-4698822-f6ei0a/index.html>
- <sup>45</sup> Hans Zell email, August 2018.
- <sup>46</sup> Kanamugire, Johnson. Textbook publishers face closure as govt starts printing school material. *Rwandatoday.africa*. [Online] August 5, 2018: <http://rwandatoday.africa/news/publishers-face-closure-as-govt-starts-printing-school-material/4383214-4698822-f6ei0a/index.html>.
- <sup>47</sup> Helping Countries Combat Corruption: The Role of the World Bank. Washington, DC: The World Bank, 1997, page 8.
- <sup>48</sup> Ibid.
- <sup>49</sup> Biggest Risk of Corruption in The Construction Industry: The Global Picture, 2014: [http://www.klgates.com/files/Publication/e3e0dfee-dc39-4ab8-8c4e-14fbabd10c4e/Presentation/PublicationAttachment/36557fb6-891f-4020-aadd-209aa092c330/Biggest\\_Risk\\_of\\_Corruption\\_in\\_the\\_Construction\\_Industry\\_Whitepaper.pdf](http://www.klgates.com/files/Publication/e3e0dfee-dc39-4ab8-8c4e-14fbabd10c4e/Presentation/PublicationAttachment/36557fb6-891f-4020-aadd-209aa092c330/Biggest_Risk_of_Corruption_in_the_Construction_Industry_Whitepaper.pdf) (Accessed on September 30, 2018).
- <sup>50</sup> Ibid.
- <sup>51</sup> Some publicized sanctions relating to textbook projects: Macmillan Ltd: <http://go.worldbank.org/8214RMIQ70>; Oxford University Press (OUP): <http://www.worldbank.org/en/news/pressrelease/2012/07/03/world-bank-sanctions-oxford-university-press-corrupt-practicesimpacting-education-projects-east-africa>; Indonesian publishers: <http://go.worldbank.org/V8DNONW9M0>.
- <sup>52</sup> See Agreement for Mutual Enforcement of Debarment Decisions: <http://siteresources.worldbank.org/NEWS/Resources/AgreementForMutualEnforcementofDebarmentDecisions.pdf> (Accessed on September 30, 2018).
- <sup>53</sup> A summary of top issues in submitted country publishing industry profiles can be found in Annex 3.
- <sup>54</sup> P Bender, TAG member interview: March 16, 2018

- 
- <sup>55</sup> Learning and teaching materials: policy and practice for provision; DFID Practice Paper by Read, T., and Treffgarne, C. (2011): <https://www.gov.uk/government/publications/learning-and-teaching-materials-policy-and-practice-for-provision-guidance-note-a-dfid-practice-paper>.
- <sup>56</sup> D Waweru, TAG member, interview: March 30, 2018
- <sup>57</sup> E Agyare, President, Ghana Book Publishers Association, interview: March 20, 2018
- <sup>58</sup> A. Berger, TAG member interview: May 23, 2018
- <sup>59</sup> Brad Turner, TAG co-chair, interview: March 30, 2018
- <sup>60</sup> Sofia Cozzolino, Save the Children, interview: April 25, 2018
- <sup>61</sup> RTI International: Survey of Children's Reading Materials in African Languages in Eleven Countries – Final Report. Washington, DC: United States Agency for International Development, Bureau for Africa, 2015.
- <sup>62</sup> Ibid., page 5
- <sup>63</sup> Simona Škrabec. Culture's Oxygen - The PEN Report. Developing the Minority-Language Creative Writing Industry in Kenya, Haiti, Serbia, and Nigeria. An Inter-Regional Research, Advocacy and Development Programme, edited by Sarah Clarke and James Tennant. London: PEN International, 2016.
- <sup>64</sup> Ibid., page 27.
- <sup>65</sup> Ibid.
- <sup>66</sup> Zell, Hans M. The African university press – A gloomy picture. *University World News Global Edition Issue 475*. [Online] September 22, 2017. <http://www.universityworldnews.com/article.php?story=20170922175606239>.
- <sup>67</sup> Ibid.
- <sup>68</sup> Ibid.
- <sup>69</sup> Statement by A. Sow, Abidjan Regional Workshop, January 2018.
- <sup>70</sup> Statement made by Lawrence Njagi, Abidjan, January 2018.
- <sup>71</sup> Report of the Regional Workshop for African Book Industry stakeholders, Abidjan, La Côte d'Ivoire: [http://www.adeanet.org/sites/default/files/adea\\_gba\\_workshop\\_report.pdf](http://www.adeanet.org/sites/default/files/adea_gba_workshop_report.pdf) (Accessed on July 31, 2018)
- <sup>72</sup> <https://code.ngo/reading-code>
- <sup>73</sup> Save the Children International. Lessons in Literacy: 8 principles to ensure every last child can read. London: Save the Children International, 2016.
- <sup>74</sup> <http://www.africanbookscollective.com/>
- <sup>75</sup> [https://comms.worldreader.org/wp-content/uploads/2018/07/LEAP-report\\_digital.pdf](https://comms.worldreader.org/wp-content/uploads/2018/07/LEAP-report_digital.pdf)
- <sup>76</sup> GBA Strategy; page 21.
- <sup>77</sup> [http://www.wipo.int/edocs/mdocs/copyright/en/wipo\\_hl\\_cr\\_yao\\_17/wipo\\_hl\\_cr\\_yao\\_17\\_action\\_plan.pdf](http://www.wipo.int/edocs/mdocs/copyright/en/wipo_hl_cr_yao_17/wipo_hl_cr_yao_17_action_plan.pdf)
- <sup>78</sup> UNESCO. (2014a). Teaching and learning: Achieving quality for all. *EFA Global Monitoring Report*.
- <sup>79</sup> Ibid.
- <sup>80</sup> Global Book Fund feasibility Study: Final Report. Results for Development Institute (R4D).
- <sup>81</sup> Ibid.
- <sup>82</sup> <http://globalbookalliance.org/flagships-2/>
- <sup>83</sup> Hans M. Zell, "African Book Industry Data, and the State of African National Bibliographies." Appendix I: Conferences, Meetings, and Seminars on Publishing and Book Development in Africa, 1968 to 2018. Forthcoming, 2018. Reproduced with kind permission of the author.